



arpReachTM

User Guide

Version 1.3

November 2012





WELCOME



arpReach[™]

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Email Marketing

A permission-based automatic follow-up system for your web site can increase sales dramatically, boost your efficiency and save you loads of time.

In short, a follow-up autoresponder is an automated “email-on-demand” system that automatically responds to e-mails sent to your domain or when a form is completed on one of your web pages.

Follow-up autorsponders reply with a pre-written email message. For a long time, functionality of autoresponders was very limited in that you could only receive one message back. That made autoresponders a great way to send information, but they weren't too effective at increasing sales. But why?

Because it normally takes around 5 to 7 exposures to a product or service before most people will buy!

***“Email
marketing can
boost your
profits on auto-
pilot”***

So clearly, creating only one exposure with a single autoresponder message wasn't getting the job done - potential customers simply weren't being exposed enough to the product. Not only that but the two vital ingredients for a sale were not there - trust and credibility

With arpReach, you can automatically send a series of pre-written follow-up messages that are almost certain to boost your response rate. Here's how it works.

You set up a series of messages that are sent to your prospect over a set number of days. For example, message #1 may go out immediately, message #2 in two days, #3 three days later, and so on.

By doing so, you can “stagger” your contacts with your potential customer and not overwhelm them, but at the same time, you're making those vital exposures needed to close the sale.





INSTALLATION



System Requirements

To run arpReach, you need the following:

- A web site hosted with a working domain name (not just an IP address)
- PHP 5.2* or greater
 - safe_mode OFF
 - MySQL extension
 - curl extension
 - GD extension
 - Open SSL extension

**arpReach may run on prior versions of PHP, however we are unable support anything before PHP 5.2*

- MySQL 5.1 or greater (InnoDB type used)
- FTP access for installing and configuring arpReach
- Ability to create and run “command line” cron/scheduled tasks (http / wget not suitable and cron tasks must not be limited by time) and access to create these tasks (eg CPanel)
- Local MTA (Sendmail, Postfix, Exim etc), or local or remote SMTP provider



Installation

Professional installation services

Professional installation, upgrade and domain or web host migration services are available from our partners

arpreach.com/install

Case sensitivity

Directory and file names on a Linux server are case sensitive. So, for example, the directory mail is different from MAIL. On a Windows server, they are the same directory.

***“Professional
installation is
available for
those who need
it”***

Create your MySQL database

The software requires one MySQL database which you need to create manually using the method supplied by your web hosting provider.

Make a note of the host, name, user name and password settings of the new database.

Getting ready to install arpReach

Unzip the issue ZIP file to a temporary directory on your local computer preserving the directory structure.

Open the file config.inc.php, enter the config settings shown and save the file. The database settings are those you used when creating the MySQL database.

Now rename the file to config.php.

Upload the files

On your web site, create a directory where you want to install the software.



Alternatively create a sub-domain. Using FTP software, upload the contents of your temporary directory to the directory you created on your web site.

The directories `schedule_logs` and `schedule_errors` and `temp` need to be writable (Linux `chmod 777`) by the web process. Use your FTP software to set this.

Run the installation wizard

In your browser, run the installation wizard using

yourdomain.com/<dir>/install/index.php

...where `<dir>` is the directory you created for the software. If you opted to create a sub-domain, the format will be

<sd>.yourdomain.com/install/index.php

...where `<sd>` is the sub-domain you created.

The installation wizard will step you through the process. Any errors will be explained and solutions suggested.

Run the software

When installation is complete, you can run the software for the first time by visiting

yourdomain.com/<dir>/a.php

or

<sd>.yourdomain.com/a.php

Running the software for the first time creates a new administrator whose sign in details are

Sign in name	admin
Password	12345

You should change these settings as soon as you can by visiting the Setup / Personal Settings menu option. Here you can also set other options to personalize your session.

**“Change
the default
password when
you sign in for
the first time”**



Activate your software

If you need to activate your software, you will be taken to the activation screen when you sign in or you can visit Setup / Activate License.

Enter the license number, license password and activation code you have been given, check the box to agree to the terms of use and click Activate Now.

Your software is now activated.

At any time, you can obtain an activation code for your software from the arpReach hub

hub.arpreach.net

“Contact your host if you need assistance with setting up your scheduled task as servers vary widely”

Create the scheduled task

The software requires one scheduled (cron on Linux) task to be created in your domain's control panel. We recommend running it every 5 minutes.

The scheduled task takes care of many operations of the software including sending due email, and managing incoming subscriptions and bounces.

Your host can advise on how scheduled tasks should be set up on your hosting. The scheduled task should NOT be set up using wget or any other HTTP or web based process as timeouts will be a problem.

It must be set up by running the script directly using “command line” PHP like this

```
php /path/to/public_html/<dir>/a.php cli/auto>/dev/null 2>&1
```

Note that this is a single command but is split here by the page formatting. php will usually be php-cli on a CPanel/WHM server.

Handling incoming email

The software needs to be able to handle incoming email to manage emailed subscriptions, unsubscriptions and bounces.



The best way to handle this is to create an email account on your domain for the exclusive use of the software.

You can usually do this in your hosting control panel.

At the same time set the “default” or “catch-all” address of your domain to forward unrouted email to this account.

The software will monitor this account for emailed subscriptions and bounces. To set this up...

In the software, visit the Setup / System Settings screen. Go into the System tab and open the Incoming email section.

Enter the details for the email account you created to handle incoming email.

Now, each time the scheduled task runs, all of the email in the email account will be read, processed and deleted.

***“Check out the
Help menu in
the software
for extensive
support
resources”***

Installation is complete

arpReach is now installed and ready for use.

Test mode

Test mode allows you to use all aspects of the software without any email actually being sent although the software will act as if it has sent it.

To enable test mode, visit Setup / System Settings, go to the Sending tab and open the Email section

There you can enable or disable test mode.

Help, training and support

Check out the Help menu in the software for extensive documentation, training and support resources.





GETTING STARTED



Getting Started

What is arpReach?

arpReach is a follow-up autoresponder and email marketing system designed by direct email marketers for direct email marketers.

It allows you to collect a list of contacts that you can contact regularly either by one-off broadcast emails or using automated follow-up. Contacts can be added through forms on your website, by email, by importing from other systems or by having them automatically added by integrating with other software (eg a shopping cart).

Typically, you will add a form to your website that asks your website visitor for their first name, last name and email address. That person then becomes a contact in arpReach and you can start to build your relationship with them by following up automatically and sending relevant email.

***“arpreach is
all you need
for direct email
marketing”***

Contact Management

Every contact in arpReach is identified by their email address and an email address can appear only in the contact list. However, every contact can belong to multiple autoresponders (follow-up sequences) and multiple categories (eg customers, prospects, hot-leads). Using the arpReach segmentation tools, you can easily target your messages to selected sections of your contact list. Extensive reporting allows you to view in numbers and charts how responsive your contacts are and you can target further those responsive (or even your unresponsive) contacts.

Delivery Tools

As ISPs continue to battle with the issue of “SPAM” (unsolicited email), arpReach has tools to help you get email through and monitor delivery by allowing you to integrate with local and remote email “senders” and monitors as well as internal tracking open rate and bounces. And as new email headers are developed to aid the fight against “SPAM”, arpReach can use them immediately. It is important to maintain a “healthy” contact list and arpReach has tools to help with that including automatic unsubscribe, suppression (do not contact) and ban (do not allow to subscribe) lists.



Social Media

Social media such as Facebook, Twitter, LinkedIn and social bookmarking sites such as AddThis are fantastic ways to have your messages shared with no extra effort from you. arpReach makes it easy to set this up to run automatically.

Multiple Personalities

arpReach allows you to create multiple personalities (personas) that act as the “senders” of your messages. A persona is an entire profile for an individual with name, address, company details, contact information etc. So if you use arpReach to send information from multiple websites or companies, you can create a persona for each of them to avoid brand confusion.

***“We are
constantly
striving to add
more useful
functionality so
let us know what
you need”***

Multi-User

If there are several people in your organisation that need access to arpReach, you can add them to the user list and set permissions for what they can view, add, change or delete within the system. For example, you might want to allow someone in Marketing to create a new follow-up message but have someone else proof-read it and approve it. Or you may wish someone in Customer Services to be able to view contacts but not add or change them. By setting up permission profiles, you can easily manage what individual people and entire groups can and cannot do within the system.

Content Management

Templates and template groups, attachment library, variables and centralized ad management are all available to help you manage your content in one place. Change it once and it changes everywhere.

Testing and Reporting

Do you want to test one follow-up message against another to see which generates the most opens? Or maybe compare sending email from your own server against a 3rd party provider? arpreach provides the testing and reporting tools to set it up easily.



Summary

We constantly strive to add more and more useful functionality so please let us know if there is anything you need.



Your First Session

Throughout this user guide, we will assume that you have installed arpreach on a subdomain “a” on your website “domain.com”.

This means that the pages you need to visit to access all the functionality will look like this

a.domain.com/a.php

In situations where the software is installed in a sub-directory of your domain (eg mail) then the pages you need to visit will look like this

domain.com/mail/a.php

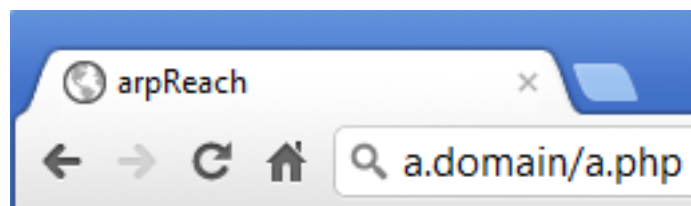
The screen at the end of the installation process tells you which page to visit to sign in our your installer can give you the information.

We recommend you bookmark the correct URL for your installation as visiting it will always take you to the signin page for your arpReach to get started. Note that some browsers will require you to put http:// at the start but most modern browsers don't require this.

“Sign in and let's get started”

Throughout this user guide, we will use the following format for all our examples

a.domain.com/a.php

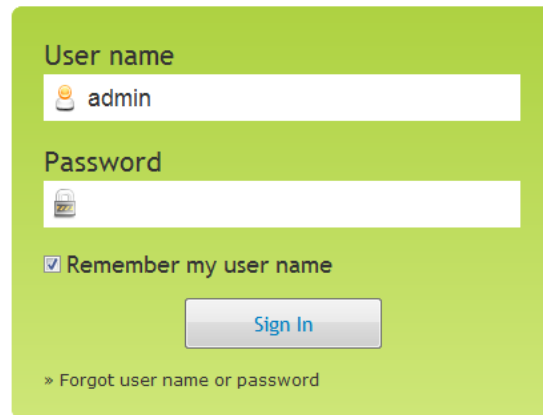


Browser address bar



Signing In

Visit the signin page (see above) and enter the default signin name and password. These are set to “admin” and “12345” for a new installation of arpReach and should be changed as soon as possible.

A green rectangular box containing a login form. It has two input fields: "User name" with a person icon and "Password" with a lock icon. The "User name" field contains the text "admin". Below the password field is a checkbox labeled "Remember my user name" which is checked. At the bottom is a "Sign In" button and a link that says "» Forgot user name or password".

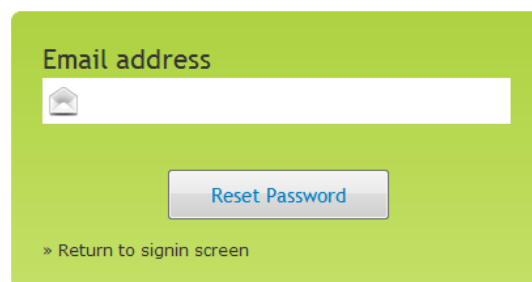
Signin box

“arpReach can send you a new password if you forget it but make sure it knows your email address”

Forgotten Password

If you have forgotten your signin user name password and arpReach knows your email address, a new password can be generated and sent to you along with your user name.

Click *Forgot user name or password* on the signin screen to access this feature.

A green rectangular box containing a form for resetting a password. It has one input field labeled "Email address" with an envelope icon. Below the field is a "Reset Password" button. At the bottom is a link that says "» Return to signin screen".

Forgotten signin name or password

Click *Return to signin screen* to exit this screen and return to the signin screen.



Screen Layout

When you have signed in, you will be taken inside arpReach where you should immediately change your password.

In the *Setup* menu, click the *Personal Settings* option. There you will find settings for your account. There are 2 tabs of settings named *Account Settings* and *Preferences*.

Personal settings

“Personal preferences are set for each user to personalize and enhance their experience of arpReach”

Enter your new password and your email address if it is blank or incorrect then click the *Save Changes* button. The next time you sign in, you will need to enter your new password. The address you enter here is the address to which your new password will be sent if you use the *forgotten password* feature on the signin screen.

In the *Preferences* tab of your personal settings, you can set your choices for items such as the visibility of the page header, the number of items shown on list screens and visibility of form field hints. You can also set your home page - the page that will be loaded every time you sign in to arpReach. You can also choose the report that will be shown on your personal dashboard.

Personal settings / preferences

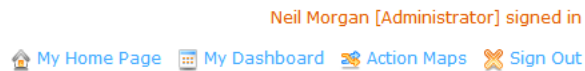


Screen Layout

Every screen in arpReach has a similar layout and some elements appear on every screen.

The header

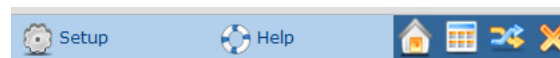
The header at the top with the arpReach logo at the left has a block of status information at the right side containing links that are personalized to you.



Status bar

To create more screen space for data, the entire header area can be turned off in the *Preferences* tab of the *Setup / Personal Settings* screen. If you do that, 4 icons will appear at the right side of the menu bar representing the home page, dashboard, action maps and sign out links.

“Turn off the screen header to create more space for your data”



User icons on help menu



My home page



My dashboard



Action maps



Sign out



Action Maps

Action maps are a way of navigating to the important areas of arpreach and to assist in leading you through the flow of each section. There are 10 action maps.

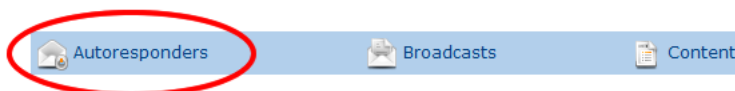
- Main action map leading to all others
- Autoresponders
- Broadcasts
- Content
- Contacts
- Setup
- Help
- Backup and restore
- Ban list management
- Suppression list management

“Use action maps to find the basic areas of the software and the menu bar when you know exactly where you need to be”

To access the main action map, click the *Action Maps* icon  or link at the top right of the screen.

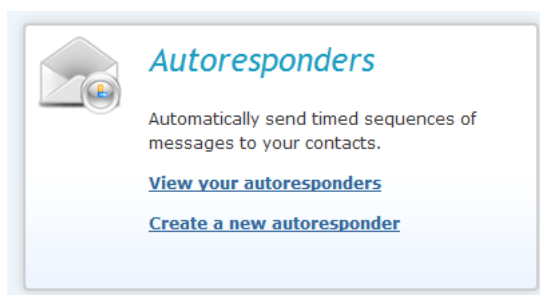
The Autoresponders, Broadcasts, Content, Contacts, Setup and Help action maps can be accessed from the main action map or by clicking the relevant option on the blue menu bar at the top.

For example, to access the Autoresponders action map, click *Autoresponders* on the menu bar.



Accessing an action map from the menu

This brings up the action map with sections where you can manage your autoresponders and autoresponder groups like this.



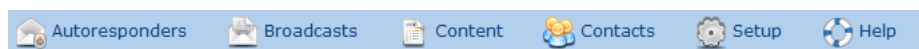
Action map section



Menu Bar

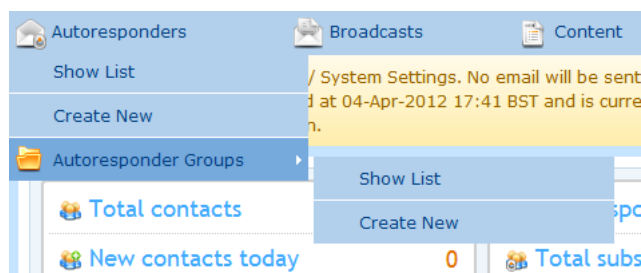
The quickest way of navigating around arpReach is using the blue menu bar at the top of the screen. The menu bar remains onscreen at all times, even if the screen header is turned off in your personal settings.

Most functions of arpreach can be reached with just a few clicks when using the menu bar.



Menu bar

Hovering your mouse pointer over a menu option for around half a second opens up the dropdown for that section, showing all the options that are available. Some sections have sub-sections as shown below.



Menu bar option open with sub-sections

“Use the menu bar to access over 70 features in just once click”

Simply click on the option you want to open that screen. The options available on the menu bar which all open into wider sections of the software are

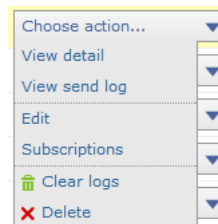
-  Autoresponders
-  Broadcasts
-  Content
-  Contacts
-  Setup
-  Help



Action Menus

Many of the screens that show tables or lists of information have an *Actions* column and every row of information has a *Choose action...* dropdown menu in that column. Note that the options in the *Choose action...* dropdown menu may change depending on the status of the item in that row.

For example, here is the *Choose action...* dropdown menu from the *Actions* column of the contact list



Contact action menu

“The *I want to...* menu may be different depending on the permissions you have been assigned by your system administrator”

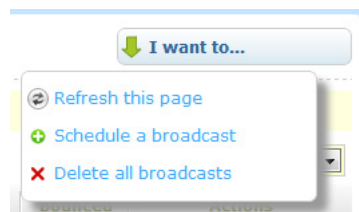
Many action menus contain *Copy* and *Copy then edit* options.

- **Copy** - makes a copy of the item and redraws the list with the new item added
- **Copy then edit** - makes a copy of the item the switches to the edit screen so the new item can be changed and saved. Note the the copy is created in the list even if no changes are made on the edit screen.

I want to... Menus

Many screens have an *I want to...* dropdown menu at the top right of the screen. The options available are different depending on the screen you are viewing.

For example, here is the *I want to...* menu from the broadcast queue manager screen.

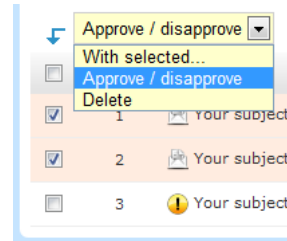


Broadcast queue *I want to...* menu



With selected... Menus

Screens with a list of information (eg the contact list) have a *With selected...* dropdown menu. These work with the checkboxes in the left-most column. Check the items from the list you want to work with then choose an option from the *With selected...* dropdown menu at the top of the column. Checking or unchecking the box at the top of the column selects or deselects all the items on the screen. Items not currently showing (for example on a multi-page list) will not be selected or deselected by this process.



Broadcast queue with selected... menu

***“The checkbox
in the column
header selects
or deselects all
items on the
screen”***



Useful information

There are various areas in arpReach where you can get useful information about the running of your system. This information is useful if you need to raise a support enquiry.

Notes bar

The yellow notes bar under the menu bar gives information about the current status of arpreach. Items that require attention are shown here and the current status of the scheduled task (that sends emails etc) is shown.

Click the notes bar to reduce its size if you need more screen space. It will return on the next screen refresh.

- The scheduled task last started at 04-Apr-2012 17:41 BST and is currently waiting.

Notes bar

“When requesting support, give as much relevant information as you can from this section”

Version and resources

Your running version and the resources it is using are shown at bottom left of every screen. Always quote your version number when raising a support enquiry.

arpReach 1.1.011 [Build 0001]
Run level 1 Run time 0.7705s Memory 8.21MB

Your Version from the page footer

We recommend that you always run the latest version of arpReach and this is available for download from the hub. At any time, you can check if there is a newer version by clicking on the *Check for Updates* option in the *Setup* menu.

Your version	1.1.010
Latest version	1.1.010
You already have the latest version	

Setup / Check for Updates



Admin System Information

You can get more useful information about your server's PHP and database systems by choosing *Help / About* then clicking on the *System* tab.

Admin PHP version	5.2.5
Admin safe mode	Off
Admin max execution time	Unlimited
Admin memory limit	256M
Admin upload max file size	32M
Admin post max size	48M
Admin memory usage	8.1M
Admin peak memory usage	8.1M
Admin MySQL version	5.0.95-community

Help / About

**“This
information
is important
if raising
a support
enquiry”**

The arpReach scheduled task which was set up as part of your installation process may use different settings from those shown on the above screen.

Scheduled Task System Information

To view the settings that the scheduled task is using, enable logging and debug mode in *Setup / System Settings / Scheduled Task* and view the scheduled task's log files that are created in the *schedule_logs* directory of your arpReach installation.

<..>		
..		
application	04/02/12 05:20	drwxr-xr-x
documentation	04/02/12 05:20	drwxr-xr-x
schedule_errors	04/02/12 06:57	drwxrwxrwx
schedule_logs	04/04/12 09:41	drwxrwxrwx
static	04/02/12 05:20	drwxr-xr-x
system	04/02/12 05:20	drwxr-xr-x
a.php	6 KB 04/02/12 14:01	-rw-r--
config.php	4 KB 04/02/12 05:18	-rw-r--
index.php	32 04/02/12 05:20	-rw-r--

arpReach directory structure

This is a system administration task that should be done by someone familiar with your server and its directory structure. The log files can be accessed by FTP software or by using your hosting control panel's file manager utility.



Help and Support

There is lots of help and support available for arpReach and a library of resources that you can use to learn about the package.

These are listed in the Help menu. Simply click on the option and you will be taken to that area on the arpReach website.

- **Online help**
 - online assistance with arpReach
- **Documentation**
 - download the latest version of the installation guide, user manual etc
- **Tutorials and training**
 - training resources including videos that walk you through features in arpReach
- **Support**
 - access to the customer help desk for those with a current support plan
- **Partners**
 - a list of approved partners for installation, upgrade, integration and other professional services
- **Product news and updates**
 - the latest news about arpReach
- **Idea factory**
 - some “best practise” ideas on how to use arpReach to build business relationships and improve your bottom line
- **Affiliate program**
 - earn money from arpReach by promoting the product simply by using it and by other promotional means

*“Earn money
just by using
your arpReach
system with
the affiliate
program”*





CONTACTS



Contacts Overview

arpReach allows you to collect the details of contacts and manage your communication with those contacts.

Contact details can be sourced in various ways.

- completing a form on your website
- sending a “subscribe me” email
- adding individually within arpReach
- importing from CSV files (such as those produced by Excel)
- importing from AutoResponse Plus (ARP3)
- added automatically by other software (eg a shopping cart)

Every contact is uniquely identified by its email address and no two contacts can have the same email address.



Contact Categories

You can create as many categories for your contacts as you need. Each contact can belong to any number of categories.

For example, you might choose to have four categories

- prospects
- customers
- interested in mountain climbing
- interested in dogs

You can assign as many of these categories to each contact as you wish or contacts need not belong to any categories - the choice is yours.

Assigning contacts to categories is a great way to segment or group them so that you can target them with your messages.

For example, you might wish to send a discount offer to your “prospects” but not to your “customers”. By correctly assigning contacts to these categories, sending that message is straightforward.

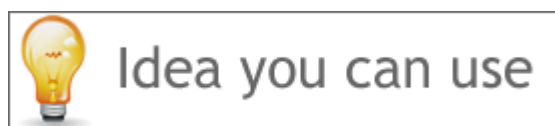


Subscriptions

A subscription is created when a contact is assigned to an autoresponder and each contact can have any number of subscriptions to one or more autoresponders.

Contacts do need to have any subscriptions and they can happily reside within your contact list without being subscribed to any autoresponders.

Most of the time, a contact will be subscribed to an autoresponder because you want the contact to receive that autoresponder's follow-up message sequence.



“Categories, subscriptions, tracking tags and segments are all ways of grouping your contacts for easy targeting”

Offer a free report on your website as an incentive for your site visitor to leave their email address. They complete a subscription form. Submitting the form creates their contact record and adds a subscription to the “free report” autoresponder for your new contact. Over the coming days, the contact is sent a series of messages inviting them to join your paid membership site.

Tracking Tags

A tracking tag is a way of keeping track of the source of your subscribers. Suppose you have multiple websites with their own subscription forms with all of those forms feeding contacts into one autoresponder. By assigning a tracking tag to a form, you can track which form a subscription came from.

Tracking tags are assigned individually to a contact's subscriptions and you can segment your list on tracking tags.

Segments

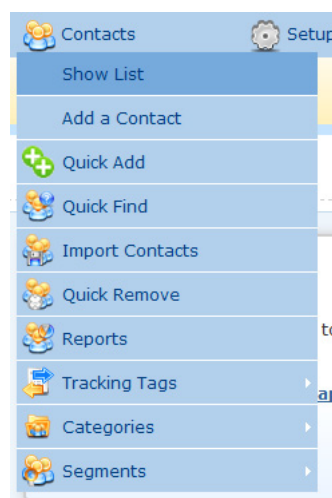
Segments are a very powerful feature of arpReach that allow you to select or group contacts based on a huge variety of criteria. Think of applying multiple “filters” to your entire list to either include or exclude contacts from the segment.

Segments are covered in a separate section of this guide.



The Contact Menu

All of the options for managing your contacts are available from the contact option on the menu bar.



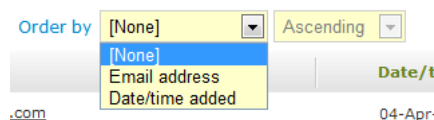
Contact menu

“Create categories and tracking tags before adding contacts so they are available when you are ready to add contacts and subscriptions”

- **Show list** - view your contact list
- **Add a contact** - add a single contact
- **Quick add** - paste a list of email addresses to add
- **Quick find** - find a contact by name or email address
- **Import contacts** - import from CSV file
- **Quick remove** - paste a list of email addresses to remove
- **Reports** - view, print and export reports about contacts
- **Tracking tags** - manage your tracking tags
- **Categories** - manage your contact categories
- **Segments** - manage your segment definitions

The Contact List

Click *Show List* in the *Contacts* menu to display your list of contacts. The list may be sorted using the dropdowns at the top of the list table.

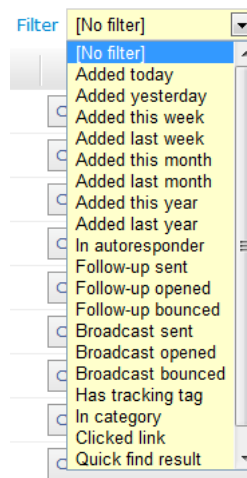


Contact order



Contact Filter

You can quickly filter this list on over 20 pre-defined criteria by selecting a filter from the filter dropdown menu at the top right.

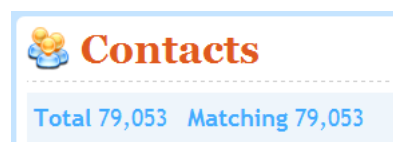


Contact filter

**“Choose one
of over 20 pre-
defined filters
with a single
click”**

You can remove the filter and return to a list containing all your contacts by choosing [No filter] from this menu.

The total number of contacts and the number matching the filter appears at the top left of the list screen.



Contact counter

List Paging

If your list contains more items than can be shown on one screen, the page selector appears at the top right. Use this to navigate through the pages of your list.



Page navigator

You can set the number of items that appears per page in your personal preferences by visiting the *Preferences* tab in *Setup / Personal Settings*.



On the contact list screen...

...for each contact, you can see

- Email address
- Date/time subscribed
- Number of subscriptions
- Number of emails sent
- Action menu

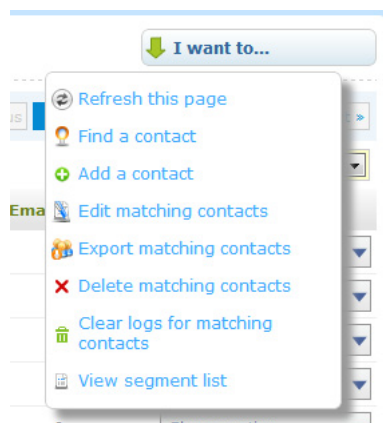
Clicking on the number of subscriptions or the number of emails sent takes you to the *subscriptions* or *send log* screens for the contact. Every contact has an action menu where you can view or change information for the contact.

“List items such as subscriptions and emails sent are clickable and drill down into the contact’s information”

- **View detail** - to view detailed information about the contact
- **View send log** - to view detailed information about every email sent to the contact
- **Edit** - to edit the contact’s information
- **Subscriptions** - to manage the contact’s autoresponder subscriptions
- **Clear logs** - to clear the send logs for the contact
- **Delete** - to delete the contact and all related information

I want to... Menu

The *I want to...* menu for the contacts list has options for adding and deleting contacts and working with contacts that match the filter currently selected from the *Filter* dropdown menu.



Contact I want to... menu



- **Refresh this page** - to update the number of subscriptions and the number of emails sent
- **Find a contact** - to find a contact by partial name or email address. This is the same as choosing *Contacts / Quick Find* from the menu bar.
- **Add a contact** - to add one contact. This is the same as choosing *Contacts / Add a Contact* from the menu bar.
- **Edit matching contacts** - to make changes to all the contacts currently selected by the filter you chose from the *Filter* dropdown menu
- **Export matching contacts** - to export in text format all the contacts currently selected by the filter you chose from the *Filter* dropdown menu
- **Delete matching contacts** - to delete all the contacts currently selected by the filter you chose from the *Filter* dropdown menu
- **Clear logs for matching contacts** - to clear the email send logs for all the contacts currently selected by the filter you chose from the *Filter* dropdown menu
- **View segment list** - to jump to the segment list where you can manage your segment definitions. This is the same as choosing *Segments / Show List* from the menu bar.

**“Check the I
Want To... menu
to see what
else you can do
on the current
screen”**

Add/Edit a Contact

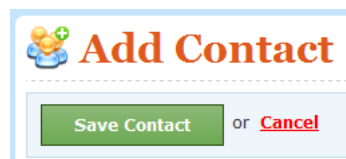
The screens for adding or editing a contact are the same. The options available are split across 5 tabs, some with multiple sections.

- Details
 - Email address and name
 - Preferences
- Contact info
 - Company
 - Address
 - Alternative email address
 - Phone numbers
 - Mobile phone numbers
 - Fax numbers
- Segmentation [choose the contact's categories]
- Custom fields [covered in a separate section]



- Notes [freeform text with notes on the contact]

When you make any changes, always remember to click the *Save Changes* button. You can switch between tabs and open and close sections within those tabs but you must click the *Save Changes* button before you leave the page.



Save your changes

Note that clicking the *Cancel* link returns you to the list screen without saving any of your changes.

Quick Add

**“Create/add
and edit screens
are laid out the
same for easy
management”**

From the menu bar, choose *Contacts / Quick Add*. Here you can paste a list of email addresses to be added to the contact list. There should be one email address per line.

Email addresses that already exist in the contact list or those that are on your banned list of addresses or domains (see *Setup / Ban Lists*) will be ignored. You can also choose one or more categories that the new contacts will be assigned to.

Remember to click the *Save Contacts* button to start the process.

Contacts / Quick Add



Quick Remove

By pasting in a list of email addresses, you can quickly remove contacts from your contact list. This facility is available by choosing *Contacts / Quick Remove* from the menu bar.

Contacts / Quick Remove

“Choose Quick Find from the Contacts menu when you need to find a contact quickly”

Paste in the list of email addresses that you want to remove and choose the remove action from the dropdown list

- **Unsubscribe** - the contacts remain in the contact list but all their autoresponder subscriptions are cancelled
- **Delete permanently** - the contacts and all related information is removed entirely from your arpReach system

Quick Find

You can quickly find one or more contacts if you have a full or partial name or email address. To use the facility, choose *Contacts / Quick Find* from the menu bar.

Contacts / Quick Find

As you start to type into the email address or name box, arpReach will offer



possible suggestions in a dropdown box. If the contact you are looking for appears in the list, select it and click the *Find Contact* button to go to the contact list screen with that contact selected. Note that the *Filter* dropdown menu has changed to *Quick find result*.

Filter Quick find result ▼

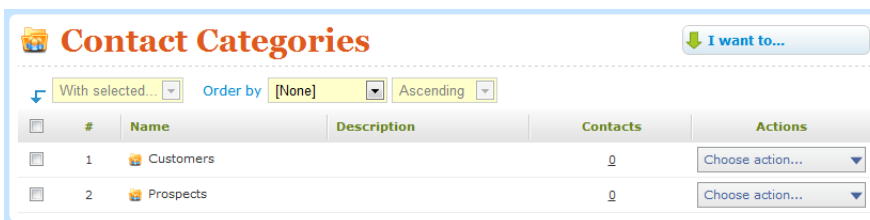
Filter for quick find result

However, as you are typing, if the contact you are looking for does not appear in the list of suggestions, enter as much of the name or email address as you know, ignore the suggestions and click the *Find Contact* button. You will be taken to the contact list screen and all contacts matching the partial name or email address you entered will be shown. You can then manually look for the contact you seek in the list displayed.

Contact Categories

“You can change the name of a contact category without affecting the contacts assigned to it”

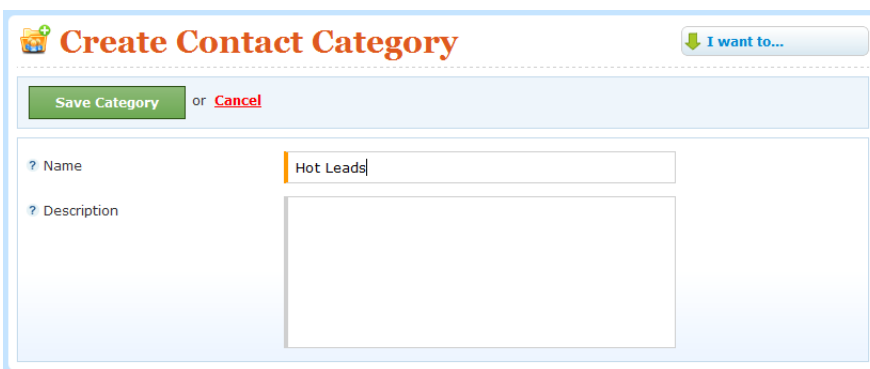
Contact categories are very easy to manage because they only have 2 settings - name and description. For any category, both of these settings can be changed at any time without affecting which contacts the category is assigned to.



#	Name	Description	Contacts	Actions
1	Customers		0	Choose action...
2	Prospects		0	Choose action...

Contacts / Categories / Show List

The list screen shows the number of contacts in the category and you can click the number to view those contacts.



Contacts / Categories / Create New



Tracking Tags

Tracking tags are used with the subscription forms that you place on your website and allow you to track which form generate a subscription. Using this facility you can see which of your forms is performing best because you can segment your list by tracking tag on success criteria such as the open rate of your messages.

Another function of tracking tags is to allow you to display custom pages to your contacts when they perform actions such as subscribing, unsubscribing or confirming a subscription. You can set the URLs of the pages you wish to display in the *Custom Pages* tab when creating or editing a tracking tag.

“Use tracking tags to monitor the success of your subscription forms”

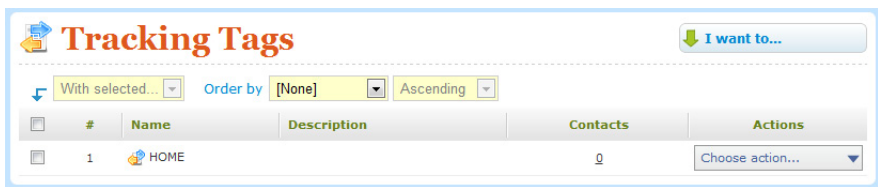
Contacts / Tracking Tags / Create New

- **Subscribe success page** - the page to be displayed when the contact successfully subscribes
- **Subscribe failure page** - the page to be displayed if there is an error when the contact submits the subscription form. For example, if the email address is not valid or the subscription is a duplicate.
- **Unsubscribe success page** - the page to be displayed when the contact successfully unsubscribes by clicking an *unsubscribe* link in a message.
- **Unsubscribe failure page** - the page to be displayed when there is an error when the contact clicks an *unsubscribe* link in a message. For example, if the contact has already unsubscribed.
- **Confirm success page** - the page to be displayed when the contact successfully confirms their subscription by clicking a *confirm* link in a message.



- **Confirm failure page** - the page to be displayed when there is an error when the contact clicks a *confirm* link in a message. For example, if their subscription is already confirmed or if the autoresponder no longer exists.
- **Next success page** - the page to be displayed when the contact successfully requests to be sent the next message in a subscription by clicking the *next message* link in a message.
- **Next failure page** - the page to be displayed when there is an error when the contact clicks the *next message* link in a message. For example, if there are no more messages in the sequence or if the autoresponder no longer exists.

The tracking tag list screen shows the number of contacts who have each tracking tag assigned to one or more of their subscriptions. Clicking the number shows those contacts.



The screenshot shows a web interface titled "Tracking Tags". At the top right is a button "I want to...". Below the title are filters: "With selected..." (dropdown), "Order by [None]" (dropdown), and "Ascending" (dropdown). Below these is a table with columns: #, Name, Description, Contacts, and Actions. The table contains one row with #1, Name "HOME" (with a house icon), an empty Description, and 0 in the Contacts column. The Actions column has a "Choose action..." dropdown.

#	Name	Description	Contacts	Actions
1	HOME		0	Choose action...

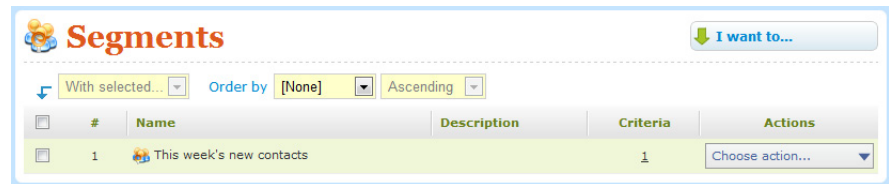
[Contacts](#) / [Tracking Tags](#) / [Show List](#)



Segments

Segments are a powerful way of filtering your contact list. You can create as many segments as you need and save them for ongoing use.

A segment definition is simply a list of criteria that determine whether or not a contact will be a member of that segment.



Contacts / Segments / Show List

The above diagram shows the segment list with one segment designed to find this week's new contacts. One criterion has been defined within the segment to achieve this.

Creating / Editing a Segment

You can define a new segment by choosing *Contacts / Segments / Create New* from the menu bar or by choosing *Create a Segment* from the *I want to...* menu on the segment list screen.

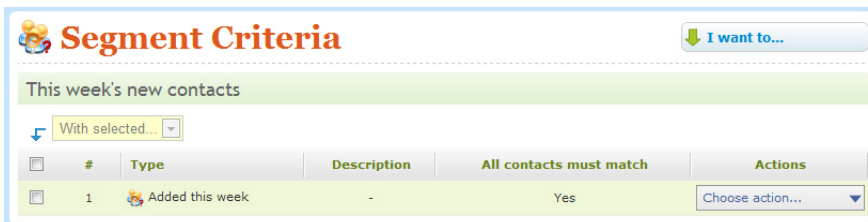
The options are the same for both defining a new segment and editing an existing segment definition.

- **Name** - enter a name for the segment.
- **Description** - enter a description for the segment.



Defining Segment Criteria

When you have saved the name and description, choose *Set Criteria* from the actions column of the segment list to define the criteria for the segment. This shows the criteria list for the segment.



Contacts / Segments / Set Criteria (in actions column)

Adding more criteria to a segment will include more contacts. But if the “all contacts must match” flag is set for a criterion then any contacts who match other criteria in the segment but not that one will be excluded from the list of matching contacts.

You can add a criterion to a segment by choosing *Add a Criterion* from the *I Want To* menu on the criteria list of the segment. You can edit an existing criterion by choosing *Edit* from the actions column of the criteria list.

The options available when adding or editing a criterion are:

- **Match type** - choose the type of match for the criterion. The choices are:
 - Standard field match (various options)
 - Added today
 - Added yesterday
 - Added this week
 - Added this month
 - Added last month
 - Added this year
 - Added last year
 - Date added (before/on/after)
 - Date added (between)
 - Autoresponder (is / is not subscribed)
 - Follow-up message (sent / opened / bounced)

“Export any report as a graphic or PDF for use in external documents and presentations”



- Subscription (various options)
- Broadcast (sent / opened / bounced)
- Tracking tag (has it / does not have it)
- Contact category (is / is not a member)
- Trackable link (clicked / did not click)
- Custom field match (various options)

When you have chosen the match type, choose the condition (eg equals, contains etc) and enter or choose the data to search for.

- **All contacts must match** - if this box is checked, every contact in the entire segment must match this criterion no matter the other criteria that are defined in the segment.

Viewing Matching Contacts

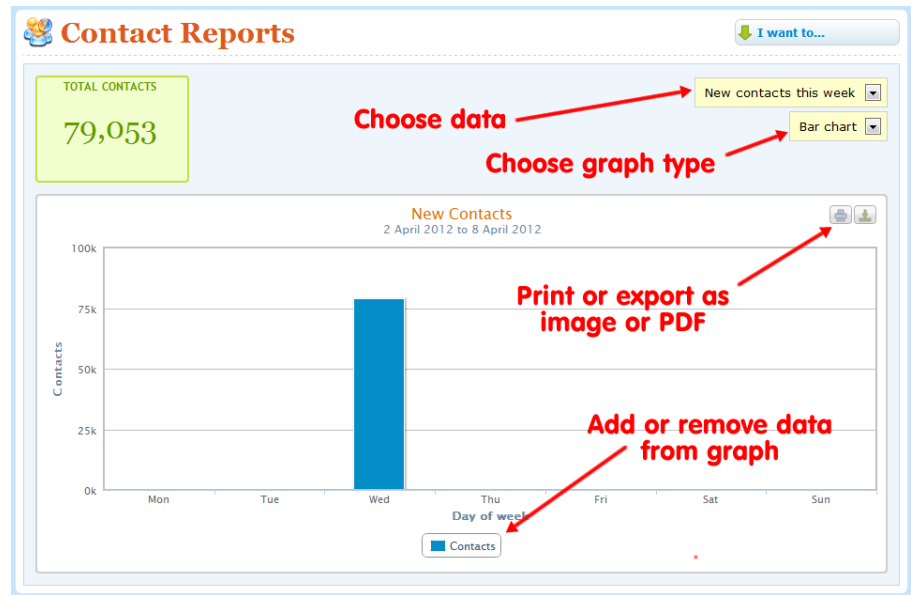
From the segment list, choose *Apply* from the actions column. You will be taken to the contact list with the segment applied.

Another way to apply a segment to your contact list is to choose *In Segment* from the *Filter* dropdown menu on the contact list, then choose the segment to be applied.



Reports

Choose *Contacts / Reports* from the menu bar to view graphical reports.

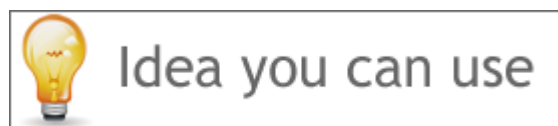


Contacts / Reports

Available data type are

- New contacts today
- New contacts yesterday
- New contacts this week
- New contacts last week
- New contacts this month
- New contacts last month
- New contacts this year
- New contacts last year

Available graph types are line chart and bar chart. Available graphic/PDF export formats are PNG, JPEG, SVG and PDF.



Use exported image and PDF reports in external documents and presentations.





AUTORESPONDERS



Autoresponders Overview

Autoresponders are pre-built sequences of follow-up messages that you can send to contacts on auto-pilot. The term “autoresponder” comes from its ability to send an immediate response when someone subscribes to it.

arpReach allows you to create any number of autoresponders and each of those autoresponders can have any number of follow-up messages in its sequence.

Each contact who is subscribed to an autoresponder can be at any point in its sequence. arpReach manages the sending of its follow-up messages, ensuring that each contact receives the sequence over the time period you have specified.

You can keep related autoresponders together in autoresponder groups. To view the autoresponders and autoresponder groups action map, click *Autoresponders* on the menu bar.



Autoresponder action map

Alternatively, from the menu bar, choose the option you want to jump directly to:

- **Autoresponders / Show List** - to view your list of autoresponders
- **Autoresponders / Create New** - to create a new autoresponder

And for autoresponder groups:

- **Autoresponders / Autoresponder Groups / Show List** - to view your list of autoresponder groups.
- **Autoresponders / Autoresponder Groups / Create New** - to create a new autoresponder group.



Autoresponder Groups

Use autoresponder groups to keep related autoresponders together. For example, you might choose to create the following groups:

- Product training
- Sales sequences
- Affiliate training
- Prospect warm-up

When you have autoresponders in a group, you can easily manage those autoresponders by filtering your autoresponder list to show only the autoresponders in that group.

To view your list of autoresponder groups, choose *Autoresponders / Autoresponder Groups / Show List* from the menu bar.

**“Use
autoresponder
groups to
keep related
autoresponders
together for easy
management”**

#	Name	Description	Autoresponders	Actions
1	Product training		2	Choose action...
2	Sales sequences		0	Choose action...
3	Affiliate training		0	Choose action...
4	Prospect warm-up		0	Choose action...

Autoresponders / Autoresponder Groups / Show List

You can sort this list on name, description and autoresponder count using the *Order by* dropdown menu and choosing *Ascending* (the default) or *Descending*.

The number of autoresponders in each group is shown in the *autoresponders* column of the table. You can click the number to jump to your autoresponder list with only the autoresponders in that group showing.

The actions menu for each entry has options to edit, copy and delete an individual group. Deleting a group does not delete the autoresponders in that group. Copying a group only copies its name and description but not the autoresponders in the original group.

The *I Want To...* menu has options to create a new group and for deleting all groups. Deleting all groups does not delete the autoresponders in those groups.



The *With Selected...* menu allows you to check multiple groups and delete them all at the same time.



Autoresponder groups / With selected...

Autoresponders

Choose *Autoresponders / Show List* from the menu bar to show your list of autoresponders.

*“Use
autoresponders
to follow up with
your prospects
and contacts on
auto-pilot”*

#	Name	Group	Address	Status	Messages	Forms	Contacts	Actions
1	arpReach Training Course	Product training	training	●	3	1	0	Choose action...
2	arpReach Advanced Training	Product training	-	●	0	0	0	Choose action...

Autoresponders / Show List

The columns in the table are:

- **Name** - the unique name you have given this autoresponder.
- **Group** - the group (if any) to which this autoresponder belongs.
- **Address** - the incoming email address (if any) for this autoresponder which can be used to subscribe or unsubscribe by email.
- **Status** - the status of this autoresponder.
 - *Live*
Accepting new subscriptions and sending messages
 - *Disabled*
Not accepting new subscriptions and not sending messages
 - *Sending paused*
Accepting new subscriptions but not sending messages



- *Prevent new subscriptions*
Not accepting subscriptions but sending messages to existing subscribers
- **Messages** - the number of messages in the autoresponder's follow-up sequence. Click on this number to view the message list.
- **Forms** - the number of subscription forms you have created for this autoresponder. Click on this number to view the form list.
- **Contacts** - the number of unique contacts who are subscribed to this autoresponder. Multiple subscriptions by individual contacts are not counted. Click this number to view the contacts who are subscribed to this autoresponder.

In the actions menu for each autoresponder, you can:

- **Reports** - view, export and print reports
- **Test** - send yourself test follow-up messages
- **Settings** - edit its settings
- **Messages** - view and manage its follow-up messages
- **Subscription forms** - view and manage its subscription forms
- **Widgets** - get HTML code to display a small image on your website showing how many subscribers an autoresponder has
- **Copy / Copy then Edit** - copy this autoresponder and all its follow-up messages
- **Delete** - delete this autoresponder and all its follow-up messages

You can sort your autoresponder list by name and contact count using the *Order by* dropdown menu and choosing *Ascending* (the default) or *Descending*.

On the autoresponder list, the *With Selected...* dropdown menu allows you to:

- delete the selected autoresponders
- change the group of the selected autoresponders
- change the status of the selected autoresponders

The *Filter* dropdown menu allows you to filter the list by:

- autoresponder group
- status
- persona (ie sending personality)
- email system



The *I Want To...* menu has options to create a new autoresponder and to delete all autoresponders.

Autoresponder Settings

When creating a new autoresponder or editing an existing one, the settings screens are the same. The settings are spread across 5 tabs:

- Settings
- Sender
- Opt-In Confirmation
- Custom Pages
- Layout
- RSS Feed

Settings Tab

General Section

- **Name** - the unique name of the autoresponder.
- **Private description** - your private description of the autoresponder. This is not published.
- **Public description** - the published description of the autoresponder.
- **Group** - the autoresponder group (if any) to which the autoresponder belongs.
- **Status** - the current status of the autoresponder.

Options Section

- **Allow retries of soft-bounces** - check this to resend follow-up messages that soft-bounce. Also set the number of soft bounces allowed before the subscription is flagged as failed.
- **Allow form subscriptions** - check this box to allow contacts to subscribe through a subscription form on a website.
- **Allow email subscriptions** - check this box to allow contacts to subscribe by sending blank email to the subscription address. Contacts can also unsubscribe by entering “unsubscribe”,



“remove”, “leave”, “stop” or “delete” in the subject line of the email.

- **Allow duplicate subscriptions** - check this box to allow one contact to subscribe to this autoresponder multiple times.
- **Action when all messages sent** - choose the action to happen when the contact reaches the end of the autoresponder’s follow-up sequence.
 - *Set to finished*
The status of the subscription will be changed to finished. If new messages are added to the sequence, the contact will not be sent them.
 - *Remain active*
The status of the subscription will remain as active. If new messages are added to the sequence, the contact will be sent the new messages.
 - *Change autoresponder*
Move the subscription to a new autoresponder. Choose the autoresponder, the message to start at and the delay before the move happens. With this option, the original subscription no longer exists.

Drop Rules Section

- **On subscribe, drop existing subscriptions...** - ensures that a contact’s existing subscriptions to the autoresponder are cancelled when a new one is created.
- **On subscribe, drop from these autoresponders** - choose which subscriptions to other autoresponders will be cancelled when a new subscription to this autoresponder occurs.

Notification Section

- **Notify on subscribe** - choose this option to send a notification email when someone subscribes to this autoresponder. Set the subject, message and list of recipients.
- **Notify on unsubscribe** - choose this option to send a notification email when someone unsubscribes from this autoresponder. Set the subject, message and list of recipients.

Use the tag %AUTORESPONDER_NAME% in the message to include the name of the autoresponder. Use the notation [[...]] to include information from the original subscription form. Example [[email_address]], [[first_name]], [[title]] etc.



Sender Tab

Email System Section

- **Send messages with this email system** - choose an email system that will be used to send all messages from this autoresponder, including follow-ups and confirmation requests.

Email systems are managed in *Setup / Email Systems*.

From and Reply-To Section

- **Sender name** - enter the “from” name of the sender of emails from this autoresponder.
- **Sender email address** - enter the “from” email address of the sender of emails from this autoresponder.
- **Reply-to email address** - enter the “reply-to” email address of the sender of emails from this autoresponder.

Persona Section

- **Send with this persona** - choose a persona (sending personality) to be used to personalize the messages sent by this autoresponder.

Personas are managed in *Setup / Personas*.

Persona tags that you can insert to include information from the selected persona are listed at the back of this user guide.

Opt-In Confirmation Tab

- **Confirmation type** - choose the type of subscription confirmation to be used for this autoresponder. This determines whether or not new subscribers will be required to confirm their subscription when they subscribe.
 - *No confirmation required*
New subscribers are not required to confirm their subscription and will therefore start to receive the autoresponder’s follow-up messages.
 - *Use system confirmation email*
New subscribers will be sent the “system” confirmation email as defined in *Setup / System Settings*.



The contact will need to click the “confirm” link in their confirmation email before they will receive any follow-up messages.

- *Use custom confirmation email*
New subscribers will be sent the custom confirmation email defined on this screen.

Ensure that the email contains the tag {CONFIRM_LINK} as this will generate the link that the contact must click to confirm their subscription.

No follow-up messages will be sent until the contact has confirmed their subscription.

For the custom confirmation type, you need to set the format to be sent, the subject and the plain text and HTML messages as appropriate. For HTML messages, click the *Toggle editor* link to view the HTML editor or enter raw HTML produced in an offline editor.

***“Many screens
use the HTML
editor - click the
toggle editor
link to switch
the editor on
and off”***

HTML message

[Toggle editor](#) | [Preview](#) | [Message length](#)

The screenshot shows a web-based HTML editor. At the top, there's a toolbar with various icons for text formatting (bold, italic, underline, text color, background color), alignment (left, center, right, justified), indentation, bulleted and numbered lists, link insertion, unlink, undo, redo, and a 'HTML' button. Below the toolbar is a large text area containing the following text: 'Hello', 'Thank you for subscribing.', 'Please confirm your subscription by clicking once on the link below or copying and pasting it into your browser.', a blue underlined link placeholder '{CONFIRM_LINK}', and 'Thank you.'. At the bottom left of the editor, it says 'Path: p'. At the bottom right, there is a blue note: 'The WYSIWYG editor may try to correct your HTML code'.

HTML editor



Custom Pages Tab

Custom pages are displayed to your contacts when they perform one of 8 actions:

- Subscribe successfully
- Fail to subscribe successfully
- Unsubscribe successfully
- Fail to unsubscribe successfully
- Confirm a subscription successfully
- Fail to confirm a subscription successfully
- Successfully request the next message in sequence
- Fail to successfully request the next message in sequence

The following items in arpReach have custom page settings and the software will use them in the following precedence order:

“The precedence order for custom pages is tracking tag then subscription form then autoresponder”

1. Tracking tag custom pages
2. Subscription form custom pages
3. Autoresponder custom pages
4. Default system pages

Example 1

A contact subscribes via a subscription form that has a tracking tag in its settings and that tracking tag has custom pages defined in its settings, then the tracking tag's custom pages will be used for that contact.

Example 2

A contact subscribes via a subscription form that has no tracking tag assigned to it but the subscription form has custom pages defined in its settings - the form's custom pages will be used for that contact.

Example 3

A contact subscribes by email to an autoresponder that has custom pages defined in its settings. Those custom pages will be used for that contact.

Example 4

A contact subscribes by email to an autoresponder that has no custom pages defined in its settings. The system default pages will be used for that contact.



Layout Tab

The options in the layout tab define some general layout settings that will be applied to all follow-up messages in the autoresponder.

Links To Include Section

- **Unsubscribe link** - append an unsubscribe link to all messages in the autoresponder. The unsubscribe link applies only to this autoresponder and no other subscriptions are affected.
- **Manage subscriptions link** - append a link that allows the contact to manage all their subscriptions on one screen.
- **Affiliate link** - append your arpReach affiliate link to all follow-up messages in the autoresponder.

Header and Footer Section

Here you can enter plain text and HTML versions of a header and footer. When defining each follow-up message in the autoresponder, you have the option of including the autoresponder's header or footer. The software will automatically use the plain text or HTML version of the header or footer depending on the type of message being sent to the contact.

Headers and footers from autoresponders can also be added to broadcasts. In a broadcast's settings, there is a dropdown where you can choose which autoresponder's header and/or footer to use.

“You can allow your contact to receive their follow-up messages by RSS feed”

RSS Feed Tab

You can allow your contact to receive their follow-up messages by RSS feed as well as by email. To allow this, check the *RSS feed enabled* box and enter the RSS channel settings for the autoresponder.

- Channel title
- Channel web page
- URL of channel logo
- Channel description

You can inform your subscriber of the URL of their RSS feed by including the tag {RSS_FEED_LINK} in follow-up messages. Note that this tag does not work in broadcasts because broadcasts are not specific to individual autoresponders.



Follow-Up Messages

Each autoresponder can have any number of follow-up messages. arpReach will send them out over a period of time you define.

To manage an autoresponder's messages, choose *Messages* from the action column dropdown or click the number in the messages column of the autoresponder list screen. This shows the message list for the autoresponder.

#	Subject	Status	Schedule	Spam score	Variants	Sent	Opened	Bounced	Position	Actions
1	Message #1 Introduction	Live	Immediate/next run	0.01 0.04	1	1	0	0	1	Choose action...
2	Message #2 Getting Started	Live	1 day	0.01 0.04	1	1	0	0	2	Choose action...
3	Message #3 Signing In	Live	1 day	0.01 0.04	1	1	0	0	3	Choose action...

Message list

The columns of information in the message table are:

**“An
autoresponder
can have
any number
of follow-up
messages”**

- **Subject** - the subject of the message.
- **Status** - the status of the message.
 - *Live*
Message live and being sent as required
 - *Inactive and skip*
Message is not live and subscribers reaching this point will jump over it and continue.
 - *Inactive and block*
Message is not live and subscribers reaching this point will stop and not receive any more messages.
- **Schedule** - when this message will be sent in relation to the previous message.
- **Spam score** - the spam score for the plain text (T) and HTML (H) versions of the message.
- **Variants** - the number of split-test variants the message has. Click the number to view the variant list.
- **Sent** - the number of unique contacts who have been sent the message. Click the number to view those contacts.
- **Opened** - the number of unique contacts who have opened the message. Click the number to view those contacts.



- **Bounced** - the number of unique contacts who have bounced this message at least once. Click the number to view those contacts.
- **Position** - the position of the message in the sequence. This option is grayed out unless *Unlock message positions* is selected from the *I Want To...* menu. When message positions are unlocked, you can also drag messages up and down the list to set their order. When done, select *Lock message positions* from the *I Want To...* menu.

In the actions menu for each message, you can:

- **Preview** - preview the message in a popup window. Your browser need to allow popups for this to work. The preview window has tabs for the plain text and HTML versions of the message.
- **Test** - send yourself a test version of the message and its split-test variants.
- **Reports** - graphical reports on the open and bounce rates for the message and its split-test variants.
- **Edit** - edit the message settings and content.
- **Variants** - manage the split-test variants for the message.
- **Copy/Copy then Edit** - create a new message by copying the message's settings and content.
- **Delete** - delete a message from the follow-up sequence.

“You can change the order of follow-up messages by dragging them into place on the message list”

In the *With Selected..* menu, you can approve or disapprove, change the status and delete the messages selected in the list.

In the *I Want To...* menu you can:

- Refresh the page to update send, open and bounce counts.
- Unlock the message positions to change their order using the *Position* column or dragging.
- View the autoresponder list.
- Add a new message to the follow-up sequence.
- Import messages from another autoresponder in your system.
- Edit the autoresponder's settings.
- Delete all the messages in the autoresponder's follow-up sequence.



Message Settings

When adding or editing a follow-up message, the settings are the same. They are spread across 3 tabs:

- Settings
- Message
- RSS feed

Edit a follow-up message

“Messages are sent by email and can also be included in the autoresponder’s RSS feed”

Settings Tab

When To Send Section

- **Status** - the status of the message. See previous section on the columns in the message list table for details of each status.
- **When to send** - when this message should be sent.
 - *Immediate / next run*
The message will be sent as soon as possible. For form, email and admin system subscriptions this means immediately. For imported data it means when the scheduled task next runs.
 - *Interval in hours / days*
The number hours / days since the previous message before this one may be sent. The message will be sent as soon as possible after the interval by the scheduled task.

For new subscriptions where no previous messages have been sent, this interval is calculated from the date and time of subscription to the autoresponder.



- *Monday to Sunday*

The message will be sent on the next occurrence of the day of the week specified, assuming the scheduled task is running on that day.

- **Approved for sending** - check this box to approve this message for sending. Only administrators and use with the correct permissions can approve messages. See permission profiles for more information.

Day, Time & Duplicate Restrictions Section

This section allows you to control the days and times that the message may be sent. For example, you may wish to prevent sending the message during the night or at weekends.

***“You can
avoid sending
messages at
weekends and
during the
night”***

- **Can only send on these days** - check the days that the message may be sent. Use this to avoid certain days such as weekends.
- **Earliest time to send** - choose the earliest time that this message may be sent. Use this to avoid sending too early in the morning.
- **Latest time to send** - choose the latest time that this message may be sent. Use this to avoid sending too late at night.
- **Never allow to be reset** - check this box to ensure that a contact is never sent this follow-up message more than once, even if the order of messages in the autoresponder is changed.

Tracking and Reporting Section

- **Track rate for HTML and multi-part messages** - check this box to the track open-rate for HTML and multi-part messages. Email technology does not allow tracking to work for plain text messages.
- **CC recipients** - enter a list of email addresses (one per line) that will be CC'd on this message every time it is sent to a contact. Note that all recipients, including the contact, will see the CC'd list.
- **BCC recipients** - enter a list of email addresses (one per line) that will be BCC'd on this message every time it is sent to a contact. Recipients, including the contact, will not see the BCC'd list.



Message Tab

Content Section

- **Subject** - enter the message subject.
- **Format** - choose the format of the message.
- **Template to load into editors** - choose a template to load into the plain text and HTML editors from your library of pre-created templates (as defined in *Content / Templates*)
- **Plain text content** - enter the plain text copy of the follow-up message.
- **HTML content** - enter the HTML content of the follow-up message. Click the *Toggle Editor* link for a full HTML editor.

Layout Section

“Click the Toggle Editor link to use the full HTML editor. It has a full-screen button for easier editing”

- **Add autoresponder’s header** - check this box to add the autoresponder’s header.
- **Add autoresponder’s footer** - check this box to add the autoresponder’s footer.

Attachments Section

- **Files to attach to message** - check the files from the attachment library (defined in *Content / Attachment Library*) that you want to attach to the follow-up message.

RSS Feed Tab

- **Include in autoresponder’s RSS feed** - check this box to include this message in the RSS feed for this autoresponder. Using this facility, you can control which of the autoresponder’s messages appear in the RSS feed and which are sent by email only.



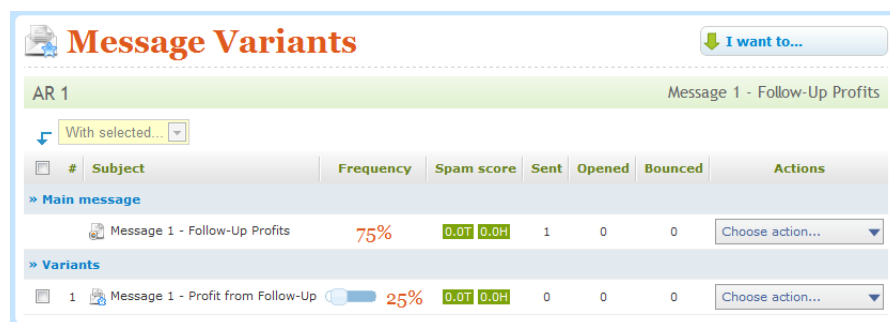
Follow-Up Message Variants

Every follow-up message can have any number of variants so that you can test out different aspects of a message to compare their success. When a variant is first added to a follow-up message, it is an exact copy of the original message. It can then be tweaked to test items such as:

- Subject
- Format
- Content
- Layout
- Attachments

To manage the variants of a follow-up message, choose the *Variants* option in the actions column of the message list or click the number in the *Variants* column of the list.

“Some message variants will produce better results than others so you can adjust the rate at which each is sent at any time”



Autoresponders / Messages / Variants (in actions column)

The above diagram shows a follow-up message with one variant where the subject line is different from the original. The *Frequency* column shows that the original message will be sent to 75% of contacts and the variant to the other 25%. The system decides at random during the sending process which message will be sent to each contact.

Choose *Add a variant to this message* from the *I Want To...* menu to add a new variant to the message. Then edit it by choosing the *Edit* option from the actions column of the variant list.

You can change the percentage of contacts to be sent each message using the slider in the *Frequency* column.



Frequency slider



Testing a Follow-Up Message

You can send yourself a test of a follow-up message (or a variant) to check its content and layout prior to setting its final scheduling. Choose *Test* from the actions column of the message list (or variant list).

Test Follow-Up Message I want to...

AR 1 Message 1 - Follow-Up Profits

Send Test Email or [Cancel](#)

? Recipient email address

? Format to send Plain text

? Also send these variants Select all • Deselect all • Invert selection

☐ Message 1 - Profit from Follow-Up

Autoresponders / Messages / Test (in actions column)

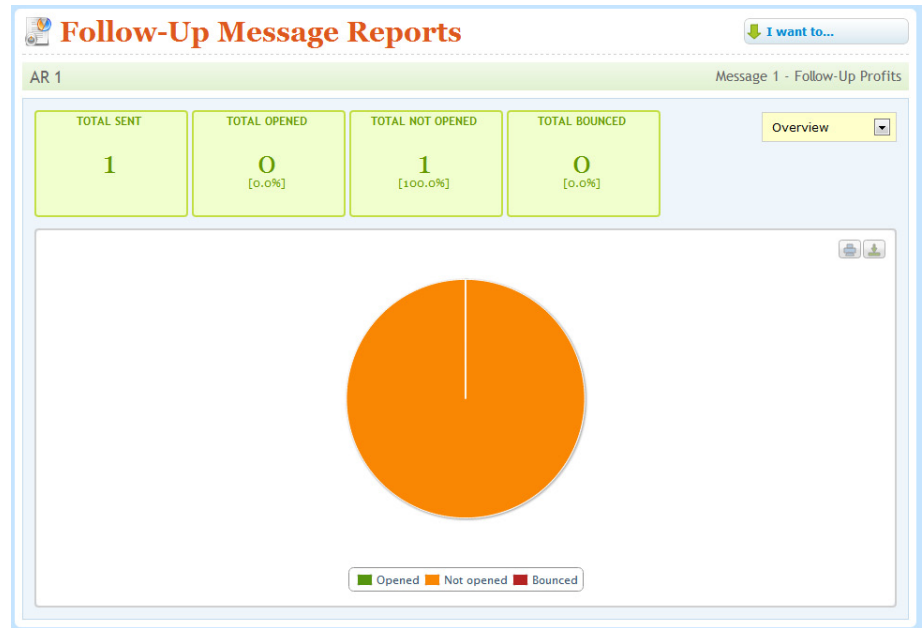
- **Recipient email address** - enter the email address where the test should be sent.
- **Format to send** - choose the format of the test to be sent. You need to have entered copy for the format chosen.
- **Also send these variants** - if the message has variants, you can have them sent to you also. Check the variants you want to be sent.



Follow-Up Message Reports

Various real-time graphs are available for follow-up messages. Choose *Reports* from the actions column of the message list. The available graphs are:

- **Overview** - a pie chart showing the percentages of opened, not opened and bounced.
- **Variant success** - a pie chart showing the open-rate success of the main message and its variants.



Autoresponders / Messages / Reports (in actions column)



Subscription Forms

You can create as many subscription forms for each autoresponder as you need. Many form settings are held within arpReach instead of in fields in the HTML of the form. This allows you greater central control of forms, meaning you can change form settings without having to alter the form's HTML on your websites.

	#	Name	Description	Actions
☐	1	Site sidebar form	Form for site sidebar	Choose action...
☐	2	Home page form	Form for home page	Choose action...

Autoresponders / Subscription forms (in actions column)

“Many form settings are held within arpReach instead of the HTML of the form code to allow easier changes without editing code”

Note that live forms must remain in the list. Do not delete forms that are currently accepting subscribers as they will become inoperable.

Creating / Editing a Subscription Form

You can create a new subscription form by choosing *Create a form for this autoresponder* from the *I want to* menu on the subscription form list.

The options are the same for both creating a new form and editing an existing form.

Settings Tab

- **Name** - enter a unique name for the form.
- **Description** - enter a description for for form.

Content Tab

This is where you define the content of the form and the way it operates.

Fields Section

For every field you want to include on the form, check the box in the *Include on form* column. Enter a label for each field you have chosen. Check the



mandatory and *capitalize* columns if required.

And custom fields that you have defined in *Content / Custom Fields* will appear in the field list and can be included on the form.

Additional Autoresponders Section

Here you can specify other autoresponders that this form will add a subscription to when a contact complete the form.

- **Always subscribe to these autoresponders** - check this box to add the contact to these autoresponders invisibly.
- **Offer these autoresponders as additional choices** - the form contains checkboxes to allow the contact to choose additional autoresponders that they wish to be subscribed to when they submit the form.

Tracking Section

- **Tracking tag to assign** - choose a tracking tag from those defined in *Contacts / Tracking Tags* to be assigned to the form. When a contact completes the form, that tracking tag will be assigned to any subscriptions created by the form. Tracking tags are designed to allow you to monitor which forms are producing most subscriptions.

Display Options Section

- **Submit button label** - enter text for the submit button.
- **Offer choice of email format** - check this box if you wish to offer the new contact the choice of plain text and HTML email formats.
- **Form type** - choose if this form will be used for subscriptions or unsubscriptions or whether the contact should be offered the choice as they are completing the form.
- **Use captcha** - check thos box to force the entry of a short security code to prevent spambots from submitting the form. This ensure that it is a human being completing the form and not a machine.



Example of captcha

*“Use captcha
to ensure your
forms are
submitted by
people and not
by machines”*



Custom Pages Tab

Custom pages are displayed to your contacts when they perform one of 8 actions:

- Subscribe successfully
- Fail to subscribe successfully
- Unsubscribe successfully
- Fail to unsubscribe successfully
- Confirm a subscription successfully
- Fail to confirm a subscription successfully
- Successfully request the next message in sequence
- Fail to successfully request the next message in sequence

The following items in arpReach have custom page settings and the software will use them in the following precedence order:

1. Tracking tag custom pages
2. Subscription form custom pages
3. Autoresponder custom pages
4. Default system pages



Generating form Code

When you have created your form, you can generate its HTML by choosing the *Get Form Code* option from the actions column of the subscription form list. Click the form code to copy it to your clipboard then paste the code into your preferred HTML editing software for styling.

As part of the styling process, the order of the fields can be changed and this will not cause a problem.


Subscription Form Code
I want to...

AR 1
Site sidebar form


Click the box to select the code. Press [Ctrl]+C or right-click to copy the code to your clipboard then paste it into your web page editor.

```

<!-- subscription_form 3212r2 -->
<div id='subscription_form_3212r2'>
<form method='post' action='http://a.arpreach.net/a.php/sub/5/3212r2'>
<div>
<label>Email address</label>
<input type='text' id='email_address' name='email_address' value=''>
</div>
<div>
<label>First name</label>
<input type='text' id='first_name' name='first_name' value=''>
</div>
<div>
<label>Last name</label>
<input type='text' id='last_name' name='last_name' value=''>
</div>
<div><input type='submit' value='Submit'></div>
</form>
</div>
<!-- subscription_form_3212r2 -->

```

Autoresponders / Subscription forms / Get form code (in actions column)

When you have finished styling the form in your preferred HTML editing software, copy the resultant HTML code and paste it into your web page.





BROADCASTS



Broadcasts Overview

arpReach has a powerful broadcast feature that allows you to send “one-off” messages to your contacts independently of any follow-up messages they might be receiving.

For example, you might use the broadcast feature to send out a weekly offer to everyone in your sales sequence. Or you might choose to send a monthly newsletter to all your contacts.

Broadcast messages can be plain text, HTML or multi-part (both plain text and HTML). You can choose to send a specific format or the format preferred by each contact.

For each broadcast you can create variants of the main message to use for split-testing purposes. Changes that can be made to variants include subject, message copy, message format, layout and attachments.



Idea you can use

With so many options available, it is a good idea to practise sending broadcast messages to a small number of your own email addresses to familiarize yourself with the process.

The Broadcast Queue

All sent and unsent broadcasts are held in the broadcast queue which is a central place where you manage all your broadcasts. From the menu bar, choose *Broadcasts / Show Queue* to view the broadcast queue.

Broadcasts										
The queue contains broadcasts that have not been approved for sending.										
With selected...		Order by [None]		Ascending		Filter [No filter]				
#	Subject	Created	When to send	Status	Spam score	Variants	Sent	Opened	Bounced	Actions
1	Test	09-Apr-2012 18:26	Next run		0.0T 0.0H	0	1	0	0	Choose action...
2	Weekly News #33	17-Apr-2012 14:02	20-Apr-2012 02:00		0.0T 0.0H	0	0	0	0	Choose action...
3	Weekly News #34	17-Apr-2012 14:03	27-Apr-2012 03:00		0.0T 0.0H	0	0	0	0	Choose action...

Broadcasts / Show Queue

The above screenshot shows the broadcast queue with 3 broadcasts, one of which is not yet approved for sending.



Using the *Order by* dropdown menu, the queue can be ordered by:

- Date/time added
- Subject
- Status
- Approved / not approved
- Send count
- Open count
- Bounce count

Using the *With Selected...* menu, you can approve / unapprove or change the status of the selected broadcasts.

The *Filter by* dropdown menu allows you to filter your list by these criteria:

- Status
- Persona
- Email system
- In a broadcast archive

Using the *I Want To...* menu, you can:

- Refresh the page to recalculate the sent, opened and bounced stats
- Schedule a new broadcast
- Delete all broadcasts from the queue

The columns of data in the broadcast queue are:

- **Subject** - the subject line of the broadcast.
- **Created** - the date and time the broadcast was created.
- **When to send** - the day, date or time the broadcast will be sent.
- **Status** - the status of the broadcast. Hover your mouse over the status icon for more information.
- **Spam score** - the individual spam scores of the plain text (T) and HTML (H) messages.
- **Variants** - the number of variants of the main message. Click the number to view those variants or add more.
- **Sent** - the number of contacts who have been sent the broadcast. Click this number to view those contacts.
- **Opened** - the number of contacts who have opened the broadcast (HTML & multi-part only). Click this number to view those contacts.



- **Bounced** - the number of contacts who bounced the broadcast. Click the number to view those contacts.

The actions column has the following options:

- **Preview** - view a preview of the broadcast in a new window. Your browser needs to allow popups for this.
- **Test** - send a test broadcast to yourself to check content and formatting before final scheduling.
- **Show log** - show the log of how this broadcast was sent out by the scheduled task.
- **Reports** - show graphical reports on the success of this broadcast.
- **Variants** - view the variant list for this broadcast. This shows the list of variants of the main message that are used in split-testing.
- **Edit** - edit the broadcast settings, content or layout.
- **Copy** - make a copy of the broadcast to be scheduled for sending in its own right.
- **Copy then edit** - make a copy of the broadcast to be scheduled for sending in its own right. Immediately go into the edit screen for the copy.
- **Delete** - delete the broadcast from the queue.

Different options may appear at other times, such as when a broadcast is being sent.

- **Pause / Unpause** - pause the broadcast. It will stop sending and remain in that state until unpause when it will then resume when the scheduled task next runs.
- **Cancel** - completely cancel a running broadcast. It cannot be resumed later.

“The options in the actions column of the broadcast queue change depending on the status of the broadcast”

Creating / Editing a Broadcast

The options for creating and editing a broadcast are identical. Note that you cannot edit a running broadcast or one that has already been sent.

To create a new broadcast, choose *Broadcasts / Schedule a Broadcast* from the menu bar or choose *Schedule a Broadcast* from the *I Want To...* menu on the broadcast queue screen.

To edit an existing broadcast, choose *Edit* from the actions column in the broadcast queue.



Broadcasts / Schedule a Broadcast

Settings Tab

“Use segments to precisely target the contacts to receive your broadcasts”

Send This Broadcast To Section

- **Recipients** - choose the recipients of the broadcast.
 - All contacts
 - Autoresponder subscribers
 - Contact category members
 - Have tracking tag (in a subscription)
 - In segment (defined in *Contacts / Segments*)

When To Send Section

Note that the date and time to send a broadcast is based on the server date and time with the timezone applied as set in *Setup / System Settings / System / General*.

- **When to send** - choose the scheduling option for the broadcast.
 - **Draft** - the message will not be sent. Use this to work on broadcasts that are not yet ready for full scheduling.
 - **Next run** - the broadcast will be sent during the next run of the scheduled task.
 - **Specific date and time** - the broadcast will be sent



during the first run of the scheduled task after the date and time set.

- **Monday to Sunday** - the broadcast will be sent during the first run of the scheduled task on the day specified.
- **Approved for sending** - broadcast must be approved for sending before they will be sent. Use permission profiles to define which users can approve broadcasts. All administrator level users can approve broadcasts.

Omit These Contacts Section

“If you want to send your broadcast only to contacts who have confirmed a subscription, check that box in the Omit These Contacts section”

- **Omit contacts whose subscriptions are all cancelled** - the broadcast will not be sent to contact who has cancelled all of their subscriptions.
- **Omit contacts who have no confirmed subscriptions** - the broadcast will not be sent to contacts who have never confirmed any subscription whether or not the autoresponders they are subscribed to currently require subscription confirmation.
- **Omit contacts whose subscriptions have all failed** - the broadcast will not be sent to contacts whose subscriptions have all failed due to a hard bounce or multiple soft bounces.

Tracking and Reporting Section

- **Track open rate for HTML and multi-part messages** - check this box to turn on open rate tracking. The technology of email does not allow the open rate of plain text messages to be tracked.

Sender Tab

Email System Section

- **Send with this email system** - choose the email system that will be used to send this broadcast.

From and Reply-To Section

- **Sender name** - enter the name of the broadcast sender.
- **Sender email address** - enter the email address of the broadcast sender.



- **Reply-to email address** - enter the reply-to email address of the broadcast sender.

Persona Section

- **Send with this persona** - choose the persona of the broadcast sender.

Message Tab

Content Section

- **Subject** - enter the broadcast subject.
- **Format** - choose the format of the broadcast.
- **Template to load into editors** - choose a template to load into the plain text and HTML editors from your library of pre-created templates (as defined in *Content / Templates*)
- **Plain text content** - enter the plain text copy of the broadcast message.
- **HTML content** - enter the HTML content of the broadcast message. Click the *Toggle Editor* link for a full HTML editor.

“Use the Layout section to add pre-created headers, footers and links”

Layout Section

- **Manage subscriptions link** - check this box to add a link to the screen where the contact can manage their subscriptions.
- **Affiliate link** - check this box to add your *Powered by arpReach* affiliate link to the message.
- **Autoresponder header to add** - choose an autoresponder's header to add at the start of the message.
- **Autoresponder footer to add** - choose an autoresponder's footer to add at the end of the message.

Attachments Section

- **Files to attach to message** - check the files from the attachment library (defined in *Content / Attachment Library*) that you want to attach to the broadcast message.



Sharing Tab

In this section you can manage how the broadcast can be made available to other people apart from your contacts by sharing. There are two sharing methods:

- Social networks
- Broadcast archives

Social Networks Section

- **Post a status update in these social networks** - choose the social networks (as defined in *Setup / Social Networks*) where you want to post a link to this broadcast as a status update.
- **Status message content** - choose the content of the status message and edit if required. Be aware of the limitation on status update length imposed by social networks.
- **Link to add to status update** - choose the link to be appended to the status update message.
- **When to post status update** - choose when the status update should be posted.
 - Start of broadcast
 - End of broadcast

“Use the sharing options to allow your contacts to spread your message for you”

Archives Section

- **Include in these archives** - check the broadcast archives (as defined in *Broadcasts / Archives*) that you want this broadcast to be included in. A broadcast can appear in as many of your broadcast archives as you want (or none of them).
- **Format to archive** - choose the format of broadcast to make available in the broadcast archive.
 - Plain text
 - HTML



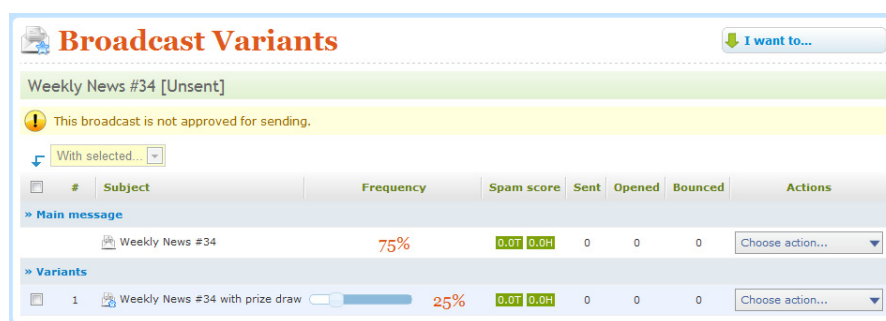
Broadcast Variants

Every broadcast can have any number of variants so that you can test out different aspects of a broadcast to compare their success. When a variant is first added to a broadcast, it is an exact copy of the original broadcast. It can then be tweaked to test items such as:

- Subject
- Format
- Content
- Layout
- Attachments

To manage the variants of a broadcast, choose the *Variants* option in the actions column of the broadcast queue or click the number in the *Variants* column of the broadcast queue.

**“Use variants
to test various
aspects of
broadcasts
against each
other”**



Broadcasts / Show Queue / Variants (in actions column)

The above diagram shows a broadcast with one variant where the subject line is different from the original. The *Frequency* column shows that the original broadcast will be sent to 75% of contacts and the variant to the other 25%. The system decides at random during the sending process which message will be sent to each contact.

Choose *Add a variant to this broadcast* from the *I Want To...* menu to add a new variant to the broadcast. Then edit it by choosing the *Edit* option from the actions column of the variant list.

You can change the percentage of contacts to be sent each message using the slider in the *Frequency* column.

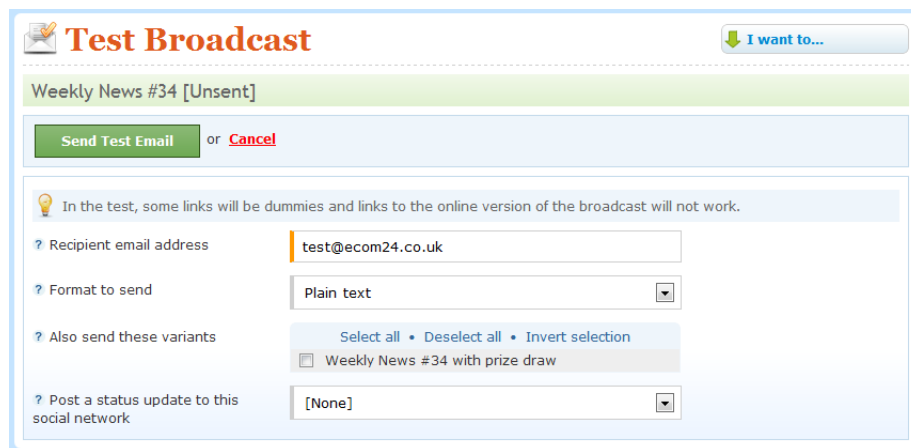


Frequency slider



Testing a Broadcast

You can send yourself a test of a broadcast (or a variant) to check its content and layout prior to setting its final scheduling. Choose *Test* from the actions column of the broadcast queue (or variant list).



Broadcasts / Show Queue / Test (in actions column)

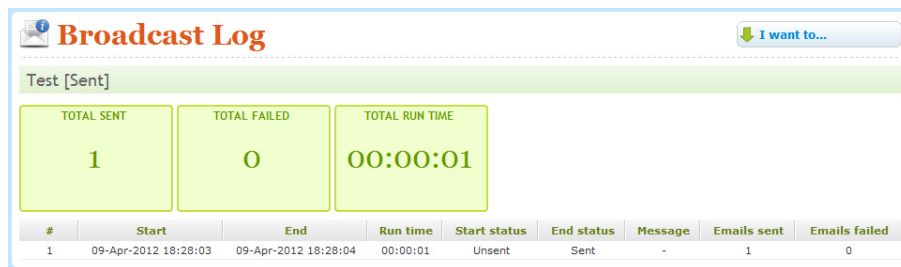
“Send yourself a test while the broadcast is still in draft to check content, layout and formatting”

- **Recipient email address** - enter the email address where the test should be sent.
- **Format to send** - choose the format of the test to be sent. You need to have entered copy for the format chosen.
- **Also send these variants** - if the broadcast has variants, you can have them sent to you also. Check the variants you want to be sent.
- **Post a status update to this social network** - allows you to test that posting is working. This is a live test and the status update will be posted to the live social network site.



Broadcast Log

Depending on the settings of your email systems as defined in *Setup / Email Systems*, broadcasts may be sent over more than one run of the scheduled task. The broadcast log shows the progress of the broadcast as it goes out across those sessions. To access the broadcast log, choose *Show Log* from the actions column of the broadcast queue.



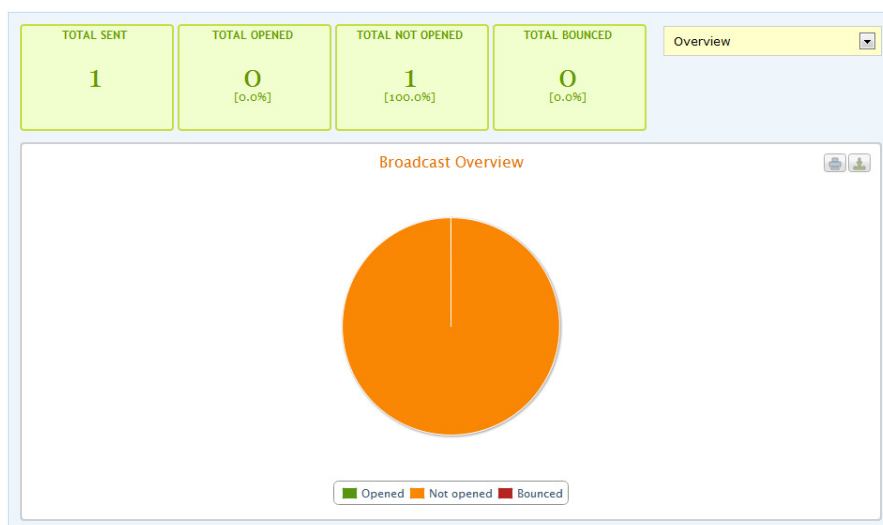
Broadcasts / Show Queue / Show Log (in actions column)

“Broadcast reports can be printed or exported as images or PDF files for inclusion in offline reports”

Broadcast Reports

Various real-time graphs are available during the sending of a broadcast and when completed. Choose *Reports* from the actions column of the broadcast queue. The available graphs are:

- **Overview** - a pie chart showing the percentages of opened, not opened and bounced.
- **Variant success** - a pie chart showing the open-rate success of the main message versus its variants.
- **Total opens over [6 hours to 14 days]**
- **Variant opens over [6 hours to 14 days]**



Broadcasts / Show Queue / Reports (in actions column)



Broadcast Archives

Broadcast archives allow you to make your broadcast content available online and share it on social networks, via bookmark sites and by RSS. Each broadcast can belong to as many of your broadcast archives as you wish.

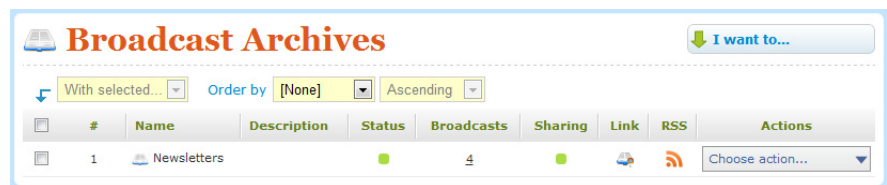


**“Archives make
your broadcast
content
available online
for sharing by
social media and
bookmarking
sites”**

Example broadcast archive

The above diagram shows a screenshot of a broadcast archive containing 4 newsletter broadcasts. Broadcasts are automatically grouped by month and year.

To manage your broadcast archives, choose *Broadcasts / Archives / Show List* from the menu bar.



Broadcasts / Archives / Show List

Click the *Link* or *RSS* icon to open the archive in a new browser tab or window. You can then copy the URL from the browser's URL bar for use in websites, blogs, emails and social network status updates.



Creating / Editing a Broadcast Archive

To create a broadcast archive, choose *Broadcasts / Archives / Create New* from the menu bar or choose *Create an Archive* from the *I want to...* menu on the archive list screen.

When creating or editing a broadcast archive, the options are the same.

Settings Tab

- **Name** - a name for the archive. This is for your use and does not appear on the archive itself.
- **Public name** - this is the name of the archive as it will appear on the archive itself. Leave this blank for no name to appear.
- **Description** - this is a private description of the archive. It does not appear on the archive itself.
- **Public description** - this description appears on the archive. Leave blank for no description to appear.
- **Status** - choose the online and offline status of the archive. The archive can be viewed only when the status is online.
- **Theme** - choose a theme for the archive as defined in *Setup / System Settings / System / Contact Screens*.

***“Broadcasts
must remain in
the broadcast
queue to appear
in archives”***

Broadcasts Tab

- **Broadcasts in archive** - choose the broadcasts that will appear in this archive. Only broadcasts that remain in the broadcast queue will appear in the archive.



Sharing Tab

- **Enable sharing** - check this box to enable social bookmark sharing icons in the archive. You need to sign up with a social bookmarking site such as AddThis.com and grab the HTML code from their site to paste into arpReach.

These sites usually allow you to specify which web page their links will lead to. From the HTML code they give you to do that, you need to insert {url} instead of an actual URL so that arpReach can insert the correct link to the broadcast.

Here is example code showing the use of {url} in HTML code supplied by the AddThis.com social bookmark site. This code is pasted into the *Share/bookmark code* box and will make the sharing options available in the archive view.



```
<!-- AddThis Button BEGIN -->
<div class="addthis_toolbox addthis_default_
style" addthis:url="{url}">
<a class="addthis_button_facebook_like"
fb:like:layout="button_count"></a>
<a class="addthis_button_tweet"></a>
<a class="addthis_button_google_plusone"
g:plusone:size="medium"></a>
<a class="addthis_counter addthis_pill_style"></
a>
</div>
<script type="text/javascript" src="http://
s7.addthis.com/js/250/addthis_widget.
js#pubid=ra-4f3d20933f35102a"></script>
<!-- AddThis Button END -->
```

- **Enable RSS feed** - check this box to enable the RSS icon on the archive screen so that visitors can add the archive's RSS feed to their RSS reader or browser.

**“Search
the social
bookmarking
site for ways
of promoting
a custom URL
then insert {url}
so arpReach
can link to
the correct
broadcast”**





CONTENT



Content Overview

The content option on the menu bar provides a central location where you can manage:

- Re-usable templates for follow-up and broadcast messages that can be grouped together for ease of management.
- Custom fields to include on subscription forms and assigned to contacts.
- The attachments library is a central repository of all the file attachments that you attach to your follow-up and broadcast messages. By managing them centrally, you can easily replace an attachment with a file without having to edit all of the messages to which it is attached.
- Variables are small snippets of information that you can include in your follow-up and broadcast messages. Information such as product prices can be included in messages and easily updated centrally without having to edit messages individually.
- Ads are larger blocks of information in both plain text and HTML format that you can “pull” into your messages with simple tags. For example, you could use these to advertise products or affiliate programs. Central management means you can change the content without having to edit messages individually.
- With trackable links you can manage links to website, monitoring the click-through rate and even the contacts who clicked the link. By managing them centrally, you can change them without having to edit your messages individually. For example, you could choose to change an affiliate link that you promote and that change will automatically appear in all the messages that contain it.



Idea you can use

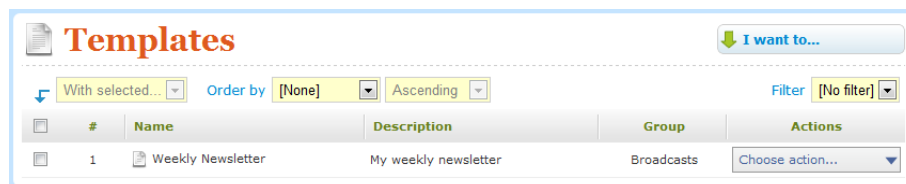
Sell advertising space in your 26 part training course. By managing this using Ads in the content menu, you don't need to change any of your follow-up messages. The changes you make to the ad will automatically appear in the messages.

The content section has an action map - click *Content* on the menu bar to access it.



Templates

A template is used to store re-usable blocks of content that you can easily pull into follow-up and broadcast messages. Each template has a unique name, a description for your use, plain text content, HTML content and an optional template group.



Content / Templates / Show List

The template list can be ordered by name, description or group name using the *Order by* dropdown menu.

You can filter the list by group using the *Filter* dropdown menu.

The *With Selected...* menu allows you to change the group or delete the selected templates.

Using the *I Want To...* dropdown menu you can create a new template or delete all templates.

The actions column in the list has options for:

- Preview (popups must be allowed in your browser)
- Edit
- Copy
- Copy then edit
- Delete

Creating / Editing a Template

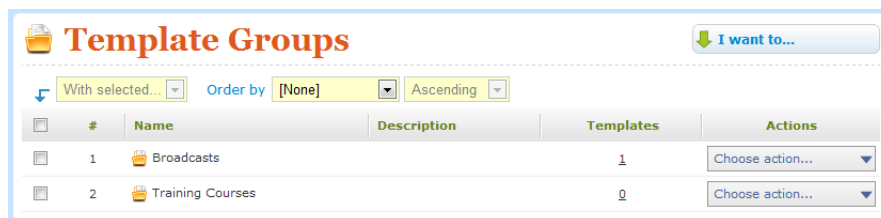
The settings are on two tabs. The *Settings* tab allows you to set the name, description and group. The *Content* tab allows you to enter the text and HTML copy of the template. For HTML, you can click the *Toggle Editor* link to view the full HTML editor.

“Make sure your browser has popups enabled for all arpReach preview features to work”



Template Groups

You can create template groups to more easily manage your templates. Each template group can contain any number of templates and you can move templates from group to group at any time.



[Content / Template Groups / Show List](#)

Templates do not have to belong to a group - simply choose [None] instead of a group for those templates.

The template group list can be ordered by name, description or template count using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected groups. Deleting a group does not delete the templates in the group.

Using the *I Want To...* dropdown menu you can create a new group or delete all groups. This does not delete the templates in those groups.

The actions column in the list has options for:

- Edit
- Copy
- Copy then edit
- Delete (templates in the group are not deleted)

Creating / Editing a Template Group

A template group simply has a unique name and a description.

**“Create groups
for your
templates
for ease of
management”**



Custom Fields

You can define any number of custom fields to store contact information that is not one of the standard fields. Custom fields can appear on subscription forms and custom information can also be added or edited in the arpReach admin system.

Custom fields must be defined before custom information can be assigned to contacts.

#	Name	Description	Tag	Field type	Actions
1	Hat size		{CUSTOM_hat_size}	Dropdown list	Choose action...
2	Shoe size		{CUSTOM_shoe_size}	Dropdown list	Choose action...
3	Town of birth		{CUSTOM_birth_town}	Single line of text	Choose action...

Content / Custom Fields / Show List

“Use custom fields to store contact information that is not covered by the standard fields such as email address, name, address etc”

A custom field has a unique name, a description, a tag that can be used to pull custom information from a contact record into a message and a field type for subscription forms. The field types are:

- Single line of text (eg for a name, word or phrase)
- Multiple lines of text (eg for a comment or enquiry)
- Dropdown list (you need to specify the choices)
- Checkbox (for yes/no type information)

The custom field list can be ordered by name or description using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected custom fields. Deleting a custom field deletes that information in contact records.

Using the *I Want To...* dropdown menu you can create a new custom field or delete all custom fields. This also deletes that information in contact records.



The actions column in the list has options for:

- Edit
- Copy
- Copy then edit
- Delete (templates in the group are not deleted)

Creating / Editing a Custom Field

When creating a custom field, the following information is required:

- **Name** - every custom field must have a unique name.
- **Tag** - every custom field must have a unique tag. This is used to pull the information from contact records into messages. For example, the tag for a “hat size” custom field could be “hat_size” and this information would be included in messages with the tag {CUSTOM_hat_size}. The tag can contain letters, number and underscores but no spaces.
- **Description** - a description for your own use.
- **Field label** - the label for this field that will appear on subscription forms that include it.
- **Field type** - the type of field as it will appear on subscription forms that include it. The choices are:
 - Single line of text
 - Multiple lines of text
 - Dropdown list (enter the choices, one one per line)
 - Checkbox

“Use a dropdown list custom field to restrict the choices your contact can make when filling out a subscription form”

The screenshot shows a configuration window for a custom field. On the left, there is a label 'Field type' with a question mark icon. To its right is a dropdown menu currently showing 'Dropdown list'. Below the dropdown, there is a text area with the label 'Available choices (one per line)' in orange. The text area contains a list of numbers: 1, 2, 3, 4, 5, 6, 7, 8, each on a new line. A vertical scrollbar is visible on the right side of the text area.

Custom field type



Attachment Library

The attachment library is a central repository of files that you can attach to your follow-up and broadcast messages.

By managing the files centrally, you can easily update a file without the need to edit all of the messages that have that file as an attachment.



[Content](#) / [Attachment Library](#) / [Show List](#)

“Centralized management of attachments means you can change them without having to change your follow-up or broadcast messages”

The attachment list can be ordered by name or description using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected attachments. There is no need to make any changes to the messages that had those attachments.

Using the *I Want To...* dropdown menu you can add a new attachment or delete all attachments.

The actions column in the list has options for:

- Preview (popups must be allowed in your browser)
- Edit
- Copy
- Copy then edit
- Delete

Adding / Editing an Attachment

When adding or editing an attachment in the library, you need to supply a unique name, a description and choose the file from your local computer to upload.

Note the the file size is limited by your webhost and they can assist if you need that limit to be raised.

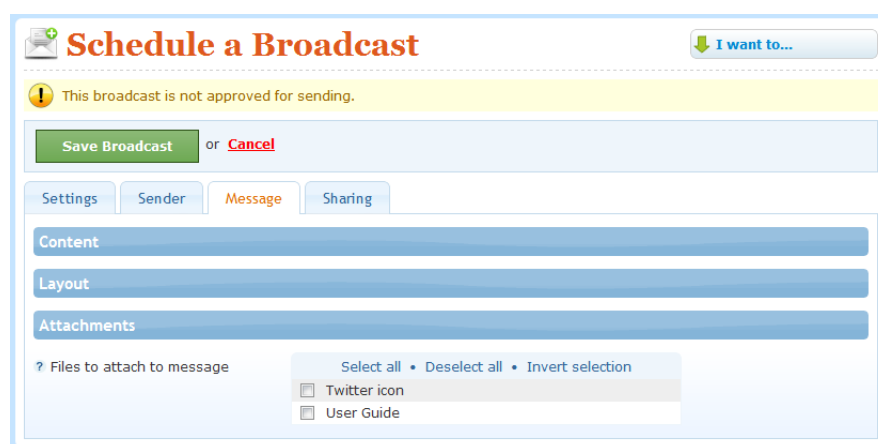


Adding an Attachment to a Message

When creating or editing a follow-up or broadcast message, you can choose the attachments to be added to the message by selecting them from the attachments list.

For broadcasts, edit or create a broadcast, go to the *Message* tab and open the *Attachments* section then check off the attachments to be added to the broadcast message. For broadcast variants, edit or create a variant and open the *Attachments* section.

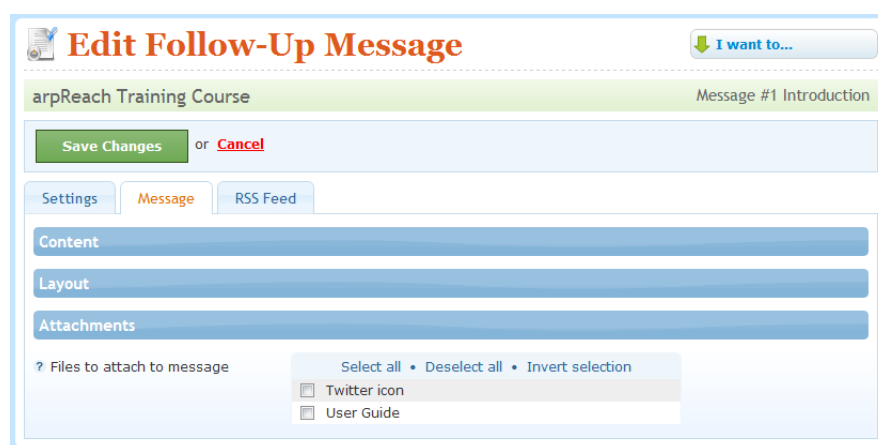
“Both broadcast and follow-up message split-test variants can have different files attached”



The screenshot shows the 'Schedule a Broadcast' interface. At the top, there's a header with a plus icon and the title 'Schedule a Broadcast'. Below the header, a yellow warning banner states 'This broadcast is not approved for sending.' Below the banner, there are two buttons: 'Save Broadcast' (green) and 'Cancel' (red). Below these buttons are four tabs: 'Settings', 'Sender', 'Message' (selected), and 'Sharing'. Under the 'Message' tab, there are three sections: 'Content', 'Layout', and 'Attachments'. The 'Attachments' section is expanded, showing a list of files to attach to the message. The list includes 'Twitter icon' and 'User Guide'. There are checkboxes next to each file name. Above the list, there are links for 'Select all', 'Deselect all', and 'Invert selection'.

Broadcast attachments

For follow-up messages, add or edit a message, go to the *Message* tab, open the *Attachments* section then check off the attachments to be added to the follow-up message. For follow-up message variants, edit or create a variant and open the *Attachments* section.



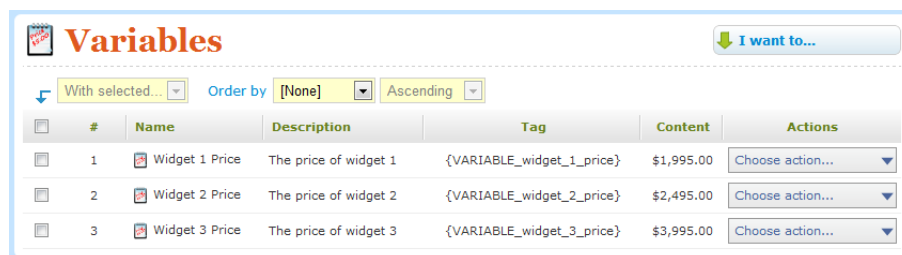
The screenshot shows the 'Edit Follow-Up Message' interface. At the top, there's a header with a document icon and the title 'Edit Follow-Up Message'. Below the header, there's a green banner with the text 'arpReach Training Course' and 'Message #1 Introduction'. Below the banner, there are two buttons: 'Save Changes' (green) and 'Cancel' (red). Below these buttons are three tabs: 'Settings', 'Message' (selected), and 'RSS Feed'. Under the 'Message' tab, there are three sections: 'Content', 'Layout', and 'Attachments'. The 'Attachments' section is expanded, showing a list of files to attach to the message. The list includes 'Twitter icon' and 'User Guide'. There are checkboxes next to each file name. Above the list, there are links for 'Select all', 'Deselect all', and 'Invert selection'.

Follow-up message attachments



Variables

Variables are small blocks of information (eg prices) that you manage centrally. You use simple tags such as {VARIABLE_price} to insert the information into follow-up and broadcast messages. If you change the content of a variable, the new information will automatically be used in your messages without having to edit them.



#	Name	Description	Tag	Content	Actions
1	Widget 1 Price	The price of widget 1	{VARIABLE_widget_1_price}	\$1,995.00	Choose action...
2	Widget 2 Price	The price of widget 2	{VARIABLE_widget_2_price}	\$2,495.00	Choose action...
3	Widget 3 Price	The price of widget 3	{VARIABLE_widget_3_price}	\$3,995.00	Choose action...

[Content](#) / [Variables](#) / [Show List](#)

“Variables are great for small snippets of information that you need to insert into messages but may need to keep changing”

The variable list can be ordered by name, description, tag or content using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected variables.

Using the *I Want To...* dropdown menu you can create a new variable or delete all variables.

The actions column in the list has options for:

- Edit
- Copy
- Copy then edit
- Delete

Creating / Editing a Variable

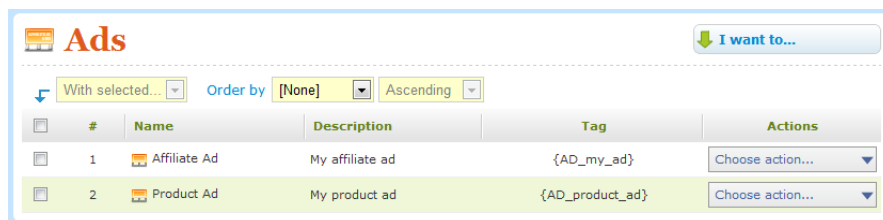
You need to supply:

- **Name** - a unique name for the variable.
- **Tag** - to insert the variable into messages.
- **Description** - for your own use.
- **Content** - the content that will be inserted into messages.



Ads

Ads are blocks of plain text and HTML that you manage centrally and can insert the latest version into follow-up and broadcast messages with simple tags such as {AD_my_ad}. If you change the content of a ad, the new version will automatically be used in your messages without having to edit them.



[Content / Ads / Show List](#)

The ad list can be ordered by name, description or tag using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected ads.

Using the *I Want To...* dropdown menu you can create a new ad or delete all ads.

The actions column in the list has options for:

- Preview (popups must be allowed in your browser)
- Edit
- Copy
- Copy then edit
- Delete

Creating / Editing an Ad

The settings are on two tabs. The *Settings* tab allows you to set the name, tag and group. The *Content* tab allows you to enter the text and HTML copy of the template. For HTML, you can click the *Toggle Editor* link to view the full HTML editor.

If your tag is “my_ad” then you would insert this ad into your follow-up and broadcast messages using {AD_my_ad}.



Trackable Links

Trackable links allow you to track the number of click-throughs to a web page and to monitor and target the contacts who clicked.

Trackable links can also be used to cloak (hide) the URL of the destination web page as this is not shown when the link is inserted into messages.

The *Contacts* column in the list table shows the number of unique contacts who have clicked the link at least once. Click the number in that column to view those contacts.



Links

 I want to...

With selected...

Order by [None]

Ascending

	#	Name	Description	Tag	Redirect to	Contacts	Actions
	1	 arpReach Home Page		{LINK_arpreach}	http://www.arpreach.com	1	Choose action...

Content / Trackable Links / Show List

The link list can be ordered by name or description using the *Order by* dropdown menu.

The *With Selected...* menu allows you to delete the selected links.

Using the *I Want To...* dropdown menu you can create a new link or delete all links.

The actions column in the list has options for:

- Report (graphical charts on click-throughs)
- Edit
- Copy
- Copy then edit
- Delete



Creating / Editing a Link

You need to supply:

- **Name** - a unique name for the link.
- **Tag** - to insert the link into messages.
- **Description** - for your own use.
- **Web page to redirect to** - the URL of the web page that the contact will be taken to when they click the link. This option has a *Test* icon to ensure the correct URL has been entered.

If your tag is “my_link” then you would insert this link into your follow-up and broadcast messages using {LINK_my_ad}.





SETUP



Setup Overview

The *Setup* option on the menu bar is where you configure your arpReach system, personal preferences, manage users, personas, email systems and social networks and maintain your suppression and ban lists.

You can access the *Setup* action map by clicking *Setup* on the menu bar.

The choices on the *Setup* menu are:

- *Personal settings*
- *Activate license*
- *System settings*
- *Social networks*
- *Users*
- *Permission profiles*
- *Personas*
- *Email systems*
- *Custom email headers*
- *Ban lists*
- *Suppression lists*
- *Backup & restore*
- *Import from ARP3*
- *Check for updates*



Personal Settings

Each user, including administrators, can use this option to change their personal details such as password and email address and to set their display preferences.

Account Settings Tab

- **Password** - enter a new signin password or leave blank to remain unchanged.
- **Name** - your name.
- **Email address** - your email address to be used when you have forgotten your signin name or password.



Preferences Tab

- **Show page header** - controls whether the page header is shown at the top of the screen when using the admin system. Switch this off to free up more screen space for data.
- **Number of list items per page** - controls how many items are shown per on list screens such as the contact list. A small number means faster screen drawing.
- **Show form field hints** - controls whether form field hint icons are shown for every field on forms. When hints are showing, hovering your mouse over the question mark will display a panel of information about that field.
- **Home page** - the page to be shown when the home icon  is clicked. The choices are:
 - My dashboard
 - Action maps
 - Autoresponder list
 - Broadcast queue
 - Contact list
 - About screen
- **Report to show on dashboard** - controls which graph is shown on your dashboard. The choices are:
 - New contacts today
 - New contacts yesterday
 - New contacts this week
 - New contacts last week
 - New contacts this month
 - New contacts last month
 - New contacts this year
 - New contacts last year
- **Format for dashboard report** - sets the chart type for the dashboard report from:
 - Line chart
 - Bar chart



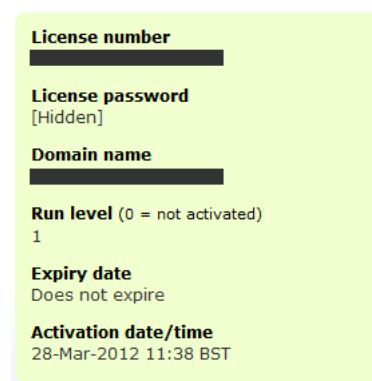
Activate License

arpReach needs to be activated before you can use it fully. You need your license number and password from your order confirmation email and an activation code obtained from the arpReach hub:

<http://hub.arpreach.net>

When you have all 3 items, paste them into this page and check the *agree to terms and conditions* box to activate your software. This process needs to be done only once, normally immediately after the software has been installed.

The license panel on this screen shows information about your license.

A screenshot of a license information panel with a light green background. It contains the following fields: 'License number' with a blacked-out value, 'License password' with '[Hidden]' below it, 'Domain name' with a blacked-out value, 'Run level (0 = not activated)' with the value '1', 'Expiry date' with the text 'Does not expire', and 'Activation date/time' with the value '28-Mar-2012 11:38 BST'.

License info

System Settings

The *Setup / System Settings* menu option is where you will find most of the options for configuring the way arpReach works. Configuration is split into 6 tabs:

- System
- Opt-in confirmation
- Custom pages
- Content
- Affiliate program
- Scheduled tasks



System Tab

General Section

- **Timezone** - enter the timezone to be used for all date and times within arpReach, including the dates and times that messages are sent.
- **Permission profile for new users** - choose a default permission profile to be assigned to any new users that you create.
- **Path to MySQL** - to restore SQL backups files. Your webhost can provide you with this information.

Outgoing Email Section

- **Enable test mode** - check this box to prevent any email being sent. When in test mode, the system will behave as if email has been sent, recording sends for each contact. Before using test mode, you may wish to take a data backup so that you can restore your dataset to the pre-test-mode state.
- **Default email system** - choose the email system that will be assigned to new autoresponders and broadcasts that you create.
- **Default sender name** - enter the sender name that will be assigned to new autoresponders and broadcasts that you create.
- **Default sender email address** - enter the sender email address that will be assigned to new autoresponders and broadcasts that you create.
- **Default reply-to email address** - enter the sender reply-to email address that will be assigned to new autoresponders and broadcasts that you create.
- **Default persona** - enter the persona that will be assigned to new autoresponders and broadcasts that you create.
- **Disable personalization** - check this box to disable all message personalization. This should not be checked in normal use.
- **Offset in hours for date tags** - enter the number of hours (+ or -) to offset dates/times that you insert into messages with the date/time tags. The offset is based on the timezone setting (see above).
- **Name** - enter the sender name that will be used to send you system messages such as subscription and unsubscription notifications.



- **Email address** - enter the sender email address that will be used to send you system messages such as subscription and unsubscription notifications.

Incoming Email Section

arpReach can monitor incoming email for the purpose of processing bounced email and handling incoming autoresponder subscription requests.

You can either use your domain's catch-all (default) email account for this, or set up a separate email account. Note that some hosts do not offer a catch-all account so you will need to use create a dedicated email account in those circumstances.

- **Email address of account** - enter the email address of the account you wish to be monitored.

Example

arpr@yourdomain.com

- **Incoming email server** - enter the incoming email server for the account. Your host can tell you what this should be.

Example

mail.yourdomain.com

- **Account user name** - the login name for the account.

Example

arpr+yourdomain.com

- **Account password** - the login password for the account.
- **Delete after processing** - check this box to delete email from the account after processing. This should always be checked in normal use.
- **Maximum number to process** - the number of incoming emails that will be processed during each run of the scheduled task. We recommend you set a limit (eg 250) on this in case there are a large number of emails.

Date Formats Section

These are the date formats that are used to insert dates and times into your messages with the tags {DATE_1} through {DATE_8}. The info bar at the



top of the section has a link to a page showing the extensive list of format options available.

Contact Screens Section

These settings allow you to control the look and feel of the following screens that are presented to contacts:

- Edit details
- Manage subscriptions
- Broadcast archive

You can choose the theme and logo, enter the URL of your own logo if you prefer. The optimum height of the logo is 85 pixels to fit with the rest of the page.

Opt-In Confirmation Tab

Autoresponders can have one of 3 different types of subscription confirmation:

- **None** - no subscription confirmation is required.
- **Custom** - confirmation email defined for each autoresponder within its settings.
- **System** - uses the system default subscription confirmation email.

The system confirmation email is defined in this section. Changing the settings within this section changes the confirmation email for all autoresponders whose confirmation setting is set to use the system confirmation email.

Sender Section

- **Send with this email system** - choose the email system to send confirmation emails.
- **Name** - enter the sender name for confirmation emails.
- **Email address** - enter the sender email address for confirmation emails.
- **Reply-to email address** - enter the sender reply-to email address for confirmation emails.



- **Send with this persona** - choose a persona to be used to personalize confirmation emails. or [None] for no persona.

Message Section

Here you can enter the subject, format preference, plain text and HTML messages for the system confirmation email. For the HTML message, click the *Toggle Editor* link for a full HTML editor.

Always ensure that the body of the email contains the {CONFIRM_LINK} tag as arpReach will replace this with a unique confirmation link that the subscriber can click to confirm their subscription.

It is important not to embed hard-coded confirmation links from example emails that you send yourself. You must use the {CONFIRM_LINK} tag to ensure that each contact receives an email with a confirmation link unique to them.

“Like all HTML messages in arpReach, you can click the Toggle Editor link to edit the message with a full HTML editor”



{CONFIRM_LINK} in message copy

When creating confirmation links for HTML copy, you can use the {CONFIRM_LINK} tag in the HTML link tag like this:

Example

`<a href='{CONFIRM_LINK}'>Click here</a>` to confirm your subscription

Custom Pages Tab

This tab contains all the default custom pages that will be assigned to new autoresponders and tracking tags and also some system-wide custom pages.



Many custom pages will have a code and message appended to the URL. Check the *Disable error code and message* box to switch these off.

Default Subscribe Section

These subscription custom pages will be used for new autoresponders and tracking tags that you create. You can change those settings within the autoresponders and tracking tags later if you wish. These are the pages that will be displayed when a contact submit a subscription form.

Default Unsubscribe Section

These unsubscription custom pages will be used for new autoresponders and tracking tags that you create. You can change those settings within the autoresponders and tracking tags later if you wish. These are the pages that will be displayed when the contact clicks an {UNSUBSCRIBE_LINK} link in a follow-up message.

“Use the default custom pages section to avoid having to set custom pages every time you create an autoresponder”

Default Confirm Subscription

These subscription confirmation custom pages will be used for new autoresponders and tracking tags that you create. You can change those settings within the autoresponders and tracking tags later if you wish. These are the pages displayed when a contact clicks a {CONFIRM_LINK} in a message to confirm an autoresponder subscription.

Confirm All Subscriptions Section

These are the custom pages that will be used when someone clicks a {CONFIRM_ALL_LINK} link in a message to confirm all their autoresponder subscriptions.

Default Next Message Section

These “send next message” custom pages will be used for new autoresponders and tracking tags that you create. You can change those settings within the



autoresponders and tracking tags later if you wish. These are the pages that are displayed when a contact clicks on a {NEXT_LINK} link in a follow-up message.

Content Tab

The sections in this tab contain standard blocks of text that you can insert into messages with simple tags. If you later change the content of these sections, the new content will be used in all messages that contain that content's tag.

Standard Messages Section

Use these tags to insert the copy into your messages:

- **Anti-spam message**
{ANTI_SPAM_MESSAGE}
- **Privacy statement**
{PRIVACY_STATEMENT}

“All tags shown in this section are also listed at the end of the guide”

Contact & Subscription Management Section

Use these tags to insert the copy into your messages:

- **Manage subscriptions link text**
{MANAGE_LINK_TEXT}
- **Edit contact details link text**
{EDIT_LINK_TEXT}
- **Next message link text**
{NEXT_LINK_TEXT}
- **Unsubscribe link text**
{UNSUBSCRIBE_LINK_TEXT}

Your Support Resources Section

Use these tags to insert the copy into your messages:

- **Your support email address**
{SUPPORT_EMAIL_ADDRESS}
- **Your support website**
{SUPPORT_WEBSITE}



Resource Boxes Section

Use these to create standard boxes of information (eg name and address) that you wish to add to your messages but manage them in one place.

Use these tags to insert the copy into your messages:

- **Plain text resource box**
{RESOURCE_BOX_TEXT}
- **HTML resource box**
{RESOURCE_BOX_HTML}

System Emails Section

This section allows you to enter the subjects and copy for several emails that the system sends you or other users:

“Use resource boxes to hold company information such as your address that you want to add to every message”

- **Forgotten signin details subject** - the subject of the email that is sent to a user who has forgotten their signin name or password.
- **Forgotten signin details copy** - the copy of the email that is sent to a user who has forgotten their signin name or password. Use the following tags to insert the information shown:
 - %USER_NAME%
The user’s signin user name.
 - %PASSWORD%
The user’s signin password.
 - %SIGNIN_URL%
The URL of the arpReach signin page.
- **Subscription notification subject for new autoresponders** - the subject of the notification email that is sent for new subscriptions. This can be changed in the settings of each autoresponder.
- **Subscription notification copy for new autoresponders** - the copy of the notification email that is sent for new subscriptions. This can be changed in the settings of each autoresponder. Use the following tags to insert the information shown:
 - %AUTORESPONDER_NAME%
The name of the autoresponder.
 - [[field_name]]
Replace field_name with the form field name you wish to include in the notification email.



- **Unsubscription notification copy for new autoresponders** - the copy of the notification email that is sent for unsubscribes. This can be changed in the settings of each autoresponder. Use the following tags to insert the information shown:
 - %AUTORESPONDER_NAME%
The name of the autoresponder.
 - %EMAIL_ADDRESS%
The email address of the subscriber.

Affiliate Program Tab

arpReach has an affiliate program and you can earn commissions by promoting the product. This is normally done using the *Powered by arpReach* link at the end of your email messages.

Your Affiliate Link Section

- **Your affiliate ID** - only enter your ID - the software will build it into a full affiliate link when required.
- **Affiliate link text** - enter the text that you wish to appear above your link at the end of your messages.

Affiliate Ads Section

If you wish to promote arpReach in your messages using more than the the simple *Powered by arpReach* link, you can create full plain text and HTML ads that can be inserted into your messages using simple tags.

- **Plain text affiliate ad** - enter the plain text copy of your affiliate ad. This can be inserted into your messages with the tag {AFFILIATE_AD_TEXT}.
- **HTML affiliate ad** - enter the HTML copy of your affiliate ad. This can be inserted into your messages with the tag {AFFILIATE_AD_HTML}.

“You can earn money from the arpReach affiliate program simply by using your software”



Scheduled Tasks Tab

arpReach has a scheduled (cron) task that runs regularly to carry out important functions of the software including sending out confirmation emails, follow-up messages and broadcasts and processing incoming email such as bounces and subscription/unsubscription requests.

Settings Section

“The scheduled task handles all of the automated functionality of the system such as sending out follow-up messages and broadcasts”

- **Enable scheduled tasks** - check this box to enable the scheduled task functionality. Note that for this to work, the scheduled task (cron) must have been set up on your server during installation.
 - *Enabled confirmations*
Allows due subscription confirmation emails to be sent out.
 - *Enable autoresponders*
Allows due follow-up messages to be sent out.
 - *Enable broadcasts*
Allows due broadcasts to be sent out.
 - *Enable incoming email processing*
Allows locally processed bounces and incoming emailed subscription and unsubscription requests to be processed.
 - *Enable remote bounce processing*
If any of your emails systems have remote bounce processing defined in their settings, check this option enables that processing.
- **Log schedule activity to file** - logs all activity of the scheduled task to files in the *schedule_logs* directory. This directory needs to have its rights and permissions correctly set at the time of installation. See the installation section for details.
 - *Hours to keep each log file*
Specify how many hours each scheduled task log file should be kept before being deleted automatically.
 - *Include debug info*
Includes system info such as memory usage that may be useful in problem diagnosis.

Cancel and Reset Section

Click this button to cancel and reset the currently running scheduled task. This option should only be used in troubleshooting situations.



Social Networks

By adding details of your social networks, arpReach can send status updates of your broadcasts. The social networks currently supported are:

- Twitter
- Facebook
- LinkedIn

Before you add a social network to arpReach, you need to log into your account on the social network and add arpReach as an application that may access your account. As part of that process, two text strings will be generated and you will need these to add your account to arpReach. Different networks give these text strings different names but are typically as follows:

- Consumer key or APP ID or API key
- Consumer secret or APP secret or secret key

To add arpReach to your social network account, you need to login to the social network in the normal way then visit the appropriate URL below to add arpReach as an application can access your account:

“Post status updates to your social networks when you send a broadcast”

Twitter

- Sign in to Twitter and visit <http://dev.twitter.com>
- You may need to sign in again.
- Choose *My Applications* from the top menu.
- Click *Create a New Application*.
- Enter the details requested. For the *Callback URL* enter <http://www.yourdomain.com> and ensure that the access level is set to read and write.



Facebook

- Sign in to Facebook and visit <http://developer.facebook.com>
- You may need to sign in again.
- Click *Apps* at the top.
- Click *Create New App*.
- Fill out the requested details which will look like this when complete:

Login to Facebook then go to <http://developer.facebook.com>

Apps ▶ Test App Choose a name Edit App **+ Create New App** Edit Settings

Settings

Summary	App ID/API Key	App secret
Site URL	http://a5.arpreach.net/	Site Domain
Canvas Page		Canvas URL
Secure Canvas URL	https://a5.arpreach.net/	Canvas FBML/iframe
Contact Email		Support Email Address

Open Graph Enter your own URL for these Edit Open Graph

You have not added any actions, objects or profile units. [Get started](#) using the Open Graph.

Facebook application settings

“Social network sites changes their APIs regularly. Check the arpReach knowledge base for the latest information”

LinkedIn

- Sign in to LinkedIn and visit <http://developer.linkedin.com>
- You may need to sign in again.
- Choose *API Keys* from the dropdown menu at the top.
- Click *Add a New Application* and enter the information requested. You can actually leave most of it blank, including the questions in the *Application Info* section.

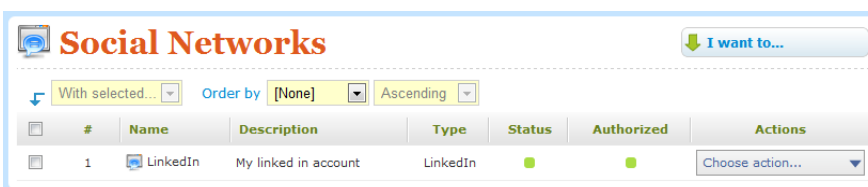
Adding the Social Network to arpReach

When you have the two keys (see above) from the social network you wish to add to arpReach, visit *Setup / Social Networks / Add a Social Network*. Fill out the name and description, choose the type and paste in the two keys that were generated for your application by the social network.



Authorizing the Social Network

After saving the social network in arpReach, you need to authorize it. Choose the *Authorize* option from the actions column of the social network list. You will be taken to the social network where you will need to log in (if not still logged in) and click the authorize button or link. You will then be taken back to your list of social networks in arpReach where you will see that your network is now authorized.



Setup / Social Networks / Show List

Testing a Social Network

“Posting a test status update is a live test and the status update will appear on the social network”

The actions column in the social network list has a *Test* option that allows you to test that arpReach can post status updates. The test is a live test and the test status update will be posted to your live social network. If you wish to delete the test status update, you can do so from the social network account, not within arpReach.

Having successfully added and authorized a social network to your arpreach system, you can now send status updates to it whenever you send a broadcast. To do this, visit the *Social Networks* section of the *Sharing* tab on the broadcast create/edit screen.

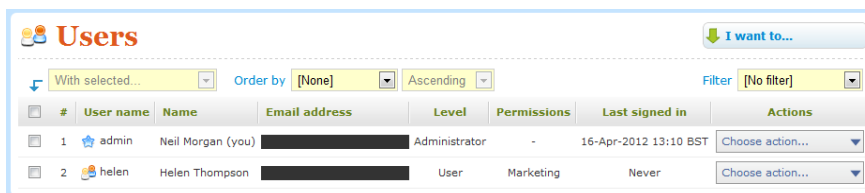


Broadcasts / Schedule a Broadcast



Users

You can add multiple users to your arpReach system and control the areas of the system that they can access by assign permission profiles. A user who has *Administrator* status cannot be assigned a permission profile and has unrestricted access to all areas of the system.



#	User name	Name	Email address	Level	Permissions	Last signed in	Actions
1	admin	Neil Morgan (you)	[REDACTED]	Administrator	-	16-Apr-2012 13:10 BST	Choose action...
2	helen	Helen Thompson	[REDACTED]	User	Marketing	Never	Choose action...

[Setup](#) / [Users](#) / [Show List](#)

When adding or editing a user, the following options are available.

“You can create any number of users and control their access to all areas of the system using permission profiles”

Account Settings Tab

- **User name** - the unique signin name the user will enter to access the system.
- **Password** - the password the user will enter to access the system.
- **Name** - the name of the user.
- **Email address** - the email address of the user. This is used to send the user their user name and a new password if they have forgotten them.
- **Level** - the access level of the user.
 - *Administrator*
Has unrestricted access to all parts of the system.
 - *User*
Has restricted access to the system. The areas that can be accessed are defined byt the user’s permission profile. If no permission profile is assigned then the user has no access to any functionality within the admin system.

Preferences Tab

- **Show page header** - controls whether the page header is shown at the top of the screen when using the admin system. Switch this off to free up more screen space for data.
- **Number of list items per page** - controls how many items are shown per on list screens such as the contact list. A small number means faster screen drawing.

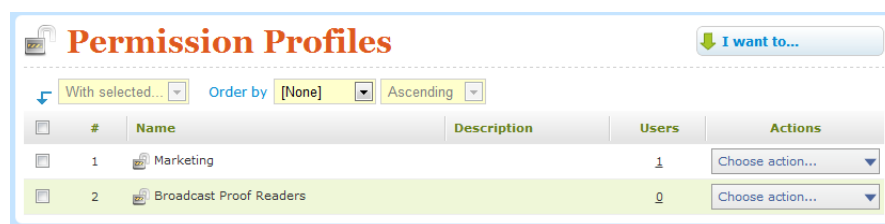


- **Show form field hints** - controls whether form field hint icons are shown for every field on forms. When hints are showing, hovering your mouse over the question mark will display a panel of information about that field.
- **Home page** - the page to be shown when the home icon  is clicked. The choices are:
 - My dashboard
 - Action maps
 - Autoresponder list
 - Broadcast queue
 - Contact list
 - About screen
- **Report to show on dashboard** - controls which graph is shown on your dashboard. The choices are:
 - New contacts today
 - New contacts yesterday
 - New contacts this week
 - New contacts last week
 - New contacts this month
 - New contacts last month
 - New contacts this year
 - New contacts last year
- **Format for dashboard report** - sets the chart type for the dashboard report from:
 - Line chart
 - Bar chart



Permission Profiles

With a permission profile, you can control which areas of the arpReach admin system can be accessed by users with that permission profile.



Setup / Permission Profiles / Show List

When you create or edit a permission profile, the following options are available.

Settings Tab

“Use permission profiles to manage the areas of the system that users can access.”

- **Name** - the unique name of the permission profile.
- **Description** - a description of the permission profile.
- **Assign to new users** - check this box to make this permission profile the default that is assigned to new users that you create in future. There can only be one default permission profile.

Permissions Tab

The permissions tab has 6 sections where you can choose the areas of the system that users with this permission profile will be able to access.

- General
- Autoresponders
- Broadcasts
- Content
- Contacts
- Setup

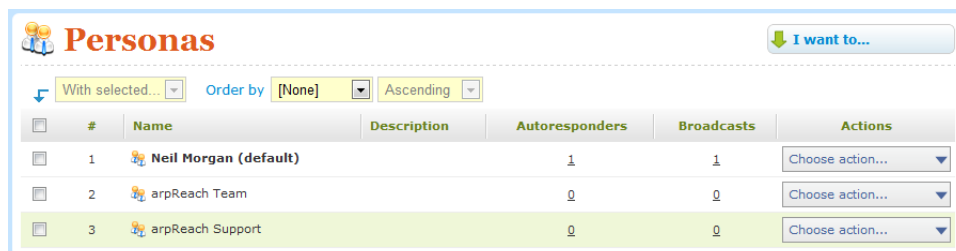
Visit each section in turn and check the boxes beside the functions you wish to make available. Use the *Select All*, *Deselect All* and *Invert* links for faster selection.

If you change the permissions in an existing permission profile, those changes will be instantly applied to all users with that permission profile.



Personas

Use personas to create different “personalities” for sending your messages. A persona contains lots of fields that you can include in your messages such as name, address and company information to create an entire sending “personality”.



#	Name	Description	Autoresponders	Broadcasts	Actions
1	Neil Morgan (default)		1	1	Choose action...
2	arpReach Team		0	0	Choose action...
3	arpReach Support		0	0	Choose action...

[Setup](#) / [Personas](#) / [Show List](#)

**“Personas
are sending
personalities
and you can
create as many
as you need
for different
websites, brands
etc”**

The list shows the number of autoresponders and broadcasts that are using each persona. The persona can be changed in the settings of individual autoresponders and broadcasts.

Creating, Editing and Using Personas

Each broadcast or autoresponder that you create can have one of your personas assigned to it. The fields from the persona can be included in messages using the tags shown:

Title	{PERSONA_TITLE}
First name	{PERSONA_FIRST_NAME}
Last name	{PERSONA_LAST_NAME}
Full name	{PERSONA_FULL_NAME}
Position	{PERSONA_POSITION}
Company	{PERSONA_COMPANY}
Address line 1	{PERSONA_ADDRESS_1}
Address line 2	{PERSONA_ADDRESS_2}
Address line 3	{PERSONA_ADDRESS_3}
Address line 4	{PERSONA_ADDRESS_4}
Address line 5	{PERSONA_ADDRESS_5}
Phone number 1	{PERSONA_PHONE_NUMBER_1}
Phone number 2	{PERSONA_PHONE_NUMBER_2}
Fax number 1	{PERSONA_FAX_NUMBER_1}
Fax number 2	{PERSONA_FAX_NUMBER_2}
Email address 1	{PERSONA_EMAIL_ADDRESS_1}
Email address 2	{PERSONA_EMAIL_ADDRESS_2}

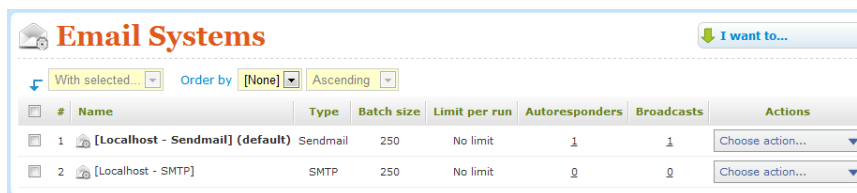


“These tags insert information about the sender, not the recipient. There are different tags to insert recipient information”

Email address 3	{PERSONA_EMAIL_ADDRESS_3}
Email address 4	{PERSONA_EMAIL_ADDRESS_4}
Email address 5	{PERSONA_EMAIL_ADDRESS_5}
Website 1	{PERSONA_WEBSITE_1}
Website 2	{PERSONA_WEBSITE_2}
Website 3	{PERSONA_WEBSITE_3}
Website 4	{PERSONA_WEBSITE_4}
Website 5	{PERSONA_WEBSITE_5}
Signature 1	{PERSONA_SIGNATURE_1}
Signature 2	{PERSONA_SIGNATURE_2}
Signature 3	{PERSONA_SIGNATURE_3}
Signature 4	{PERSONA_SIGNATURE_4}
Signature 5	{PERSONA_SIGNATURE_5}
Resource box 1	{PERSONA_RESOURCE_BOX_1}
Resource box 2	{PERSONA_RESOURCE_BOX_2}
Resource box 3	{PERSONA_RESOURCE_BOX_3}
Resource box 4	{PERSONA_RESOURCE_BOX_4}
Resource box 5	{PERSONA_RESOURCE_BOX_5}
Other info 1	{PERSONA_OTHER_1}
Other info 2	{PERSONA_OTHER_2}
Other info 3	{PERSONA_OTHER_3}
Other info 4	{PERSONA_OTHER_4}
Other info 5	{PERSONA_OTHER_5}

Email Systems

arpReach allows you to add as many local and remote email systems as you need. They can be local MTA systems such as Sendmail or Exim or SMTP servers that may or may not require authentication.



#	Name	Type	Batch size	Limit per run	Autoresponders	Broadcasts	Actions
1	[Localhost - Sendmail] (default)	Sendmail	250	No limit	1	1	Choose action...
2	[Localhost - SMTP]	SMTP	250	No limit	0	0	Choose action...

[Setup](#) / [Email Systems](#) / [Show List](#)

Every autoresponder and broadcast that you create has a sending email system and the email system you assign as the default is assigned to new autoresponders and broadcasts. This can be changed in the settings of individual autoresponders and broadcasts.



Adding or Editing an Email System

Settings Tab

- **Name** - a unique name for the email system.
- **Description** - a description of the email system.
- **Set as the default** - check this box to use this email system as the default for new autoresponders and broadcasts. This can be changed in the settings of individual autoresponders and broadcasts.

Options Tab

Server Settings Section

“You can create as many local and remote email sending systems as you need”

- **Sending method** - choose the sending method from
 - *Sendmail*
local mail transport software on your web server such as Sendmail or clones like Exim. You need to provide the path to Sendmail which your webhost can provide if you don't know it.
 - *SMTP*
A local or remote SMTP server. You need to provide the server details including login credentials if the SMTP server requires them. The provider of the SMTP server can give you these details.

Advanced Section

- **Batch size** - enter the number of contacts that will be processed in each batch for this email system. A higher number requires more memory but requires less database reads/writes and is therefore faster. The default is 250 and this is recommended for most situations.
- **Send limit per run** - the number of emails that this email system may send during one run of the scheduled task. Use this to stay within your host's sending limit if they have one.
- **Delay between each email** - the number of milliseconds between every email sent by this email system. Use this if your host requires a delay. It should be zero for most situations.
- **Character set** - choose the character set to send email in. The



default is UTF-8 and this should be suitable for most situations.

- **Bounce address type** - choose how bounces will be handled for email sent by this email system.
 - *Local*
This is the normal settings and bounces are processed locally as they arrive at the incoming address being monitored as set up in Setup / System Settings / System / Incoming Email.
 - *Remote*
Use this setting if you use the services of a remote bounce processor. They will provide you with the server and login details to enter here.

Custom Headers Section

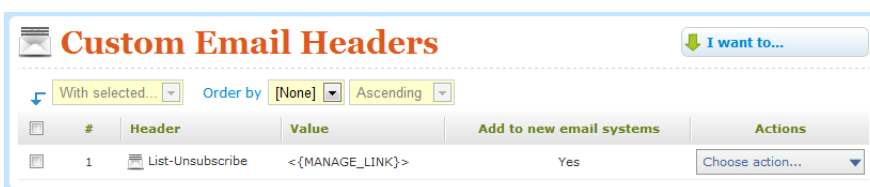
From the custom headers available (see next section), choose the custom email headers that you want to be added to all email sent by this email system.

“ISPs use special email headers in their battle against SPAM. arpReach allows you to define as many as you need.”

Custom Email Headers

In the fight against SPAM, ISPs are increasingly using special information in email headers to manage unsubscribes and to help their systems decide if incoming email is legitimate.

arpReach allows you to create any number of custom email headers and assign them to any of your sending email systems.



Setup / Custom Email Headers / Show List

As ISP requirements change, we occasionally add some custom headers as defaults meaning they are automatically created when you install arpReach. List-Unsubscribe is one such default custom header and it inserts a “manage subscriptions” link into the header of emails as required by some ISPs.

You can add new custom headers as ISPs start to use them. You can use any of the personalization tags in arpReach to construct the link format and insert the correct information for the recipient contact.



Ban Lists

Ban lists prevent unwanted people from subscribing either by a web form, by email or in the admin system manually or by importing. There are two ban lists:

- **Domain ban list** - a list of domains from which no email address is allowed subscribe.
- **Email ban list** - a list of specific email addresses that are not allowed to subscribe.

Banned Domains				I want to...
With selected... Order by [None] Ascending				
	#	Domain name	Actions	
☐	1	 domain1.com	Choose action...	
☐	2	 domain2.com	Choose action...	
☐	3	 domain3.com	Choose action...	
☐	4	 domain4.co.uk	Choose action...	

Setup / Ban Lists / Domain Ban List

Banned Email Addresses				I want to...
With selected... Order by [None] Ascending				
	#	Email address	Actions	
☐	1	 user1@domain1.com	Choose action...	
☐	2	 user2@domain2.com	Choose action...	
☐	3	 user3@domain3.com	Choose action...	
☐	4	 user4@domain4.co.uk	Choose action...	

Setup / Ban Lists / Email Ban List



Suppression Lists

Suppression lists prevent any email being sent to specific contacts. There are two suppression lists:

- **Domain suppression list** - a list of domains to which no email will be sent to any contact whose email address is at a domain on the list.
- **Email suppression list** - a list of specific email addresses to which no email will be sent.

Suppressed Domains			I want to...
With selected... Order by [None] Ascending			
☐	#	Domain name	Actions
☐	1	 domain1.com	Choose action...
☐	2	 domain2.com	Choose action...
☐	3	 domain3.com	Choose action...
☐	4	 domain4.co.uk	Choose action...

Setup / Suppression Lists / Domain Suppression List

Suppressed Email Addresses			I want to...
With selected... Order by [None] Ascending			
☐	#	Email address	Actions
☐	1	 user1@domain1.com	Choose action...
☐	2	 user2@domain2.com	Choose action...
☐	3	 user3@domain3.com	Choose action...
☐	4	 user4@domain4.co.uk	Choose action...

Setup / Suppression Lists / Email Suppression List



Backup and Restore

You can backup your arpReach system's SQL data using this facility and also restore it when necessary.

Note that due to PHP memory constraints and other PHP limitations, it may not be possible to use these facilities. In those circumstances, your webhost can give you alternative ways to backup and restore your SQL data. Alternatives may be PHPMysqlAdmin or via the command line. Your webhost can advise.

Backing Up Data

Use this procedure to make a complete backup of your entire arpReach data set.

- Select *Setup / Backup & Restore / Backup Data*.
- Select the file type required (SQL or ZIP).
- Click the *Create Backup* button.
- Click the disk icon on the next screen to download the backup.

Restoring Data

You can restore previously backed up data using this facility.

WARNING - this deletes all current data before restoring!

- Select *Setup / Backup & Restore / Restore Data*.
- Upload the file to restore.
- On the next screen, check the box to confirm you understand that all data will be overwritten by the restore process.
- Click the *Confirm* button to start the restore process.

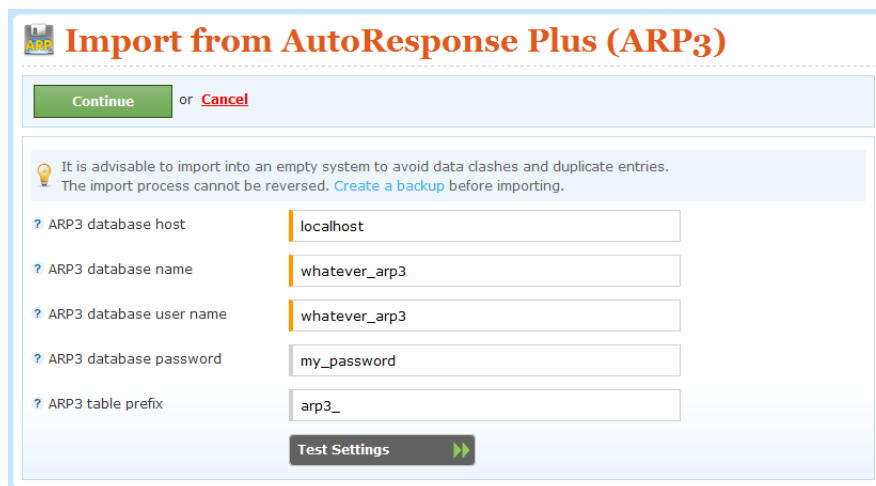
“Consider taking a new backup before restoring an old one to ensure you can get back to your current state”



Import from ARP3

If you have AutoResponse Plus (ARP3) data in a MySQL database that is accessible by the server where arpReach resides then you can import that data. We advise importing ARP3 data into a fresh arpReach system with no data to avoid clashes and overwrites. You will need the database credentials of the MySQL database holding the ARP3 data. To restore ARP3 data, visit *Setup / Import from ARP3* and enter the ARP3 MySQL database credentials. You can test them with the *Test Settings* button.

“Import ARP3 data into a fresh installation of arpReach and always import from top to bottom to preserve dependencies”



Import from AutoResponse Plus (ARP3)

[Continue](#) or [Cancel](#)

It is advisable to import into an empty system to avoid data clashes and duplicate entries. The import process cannot be reversed. [Create a backup](#) before importing.

ARP3 database host: localhost

ARP3 database name: whatever_arp3

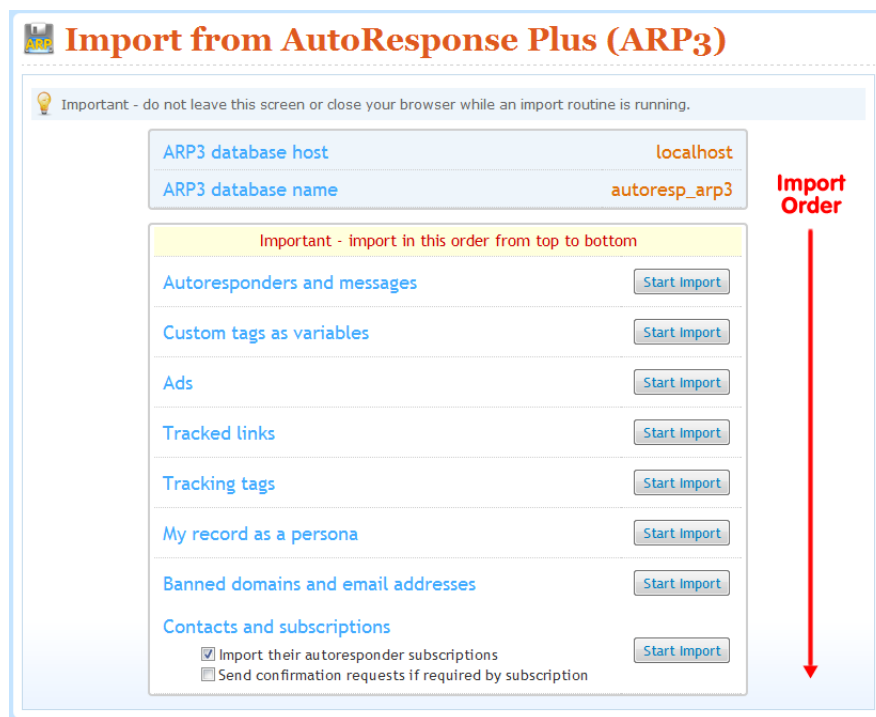
ARP3 database user name: whatever_arp3

ARP3 database password: my_password

ARP3 table prefix: arp3_

[Test Settings](#)

Setup / Import from ARP3 - Screen 1



Import from AutoResponse Plus (ARP3)

Important - do not leave this screen or close your browser while an import routine is running.

ARP3 database host: localhost

ARP3 database name: autoresp_arp3

Important - import in this order from top to bottom

Autoresponders and messages	Start Import
Custom tags as variables	Start Import
Ads	Start Import
Tracked links	Start Import
Tracking tags	Start Import
My record as a persona	Start Import
Banned domains and email addresses	Start Import
Contacts and subscriptions	Start Import

☒ Import their autoresponder subscriptions

☐ Send confirmation requests if required by subscription

Import Order (indicated by a red arrow pointing down)

Setup / Import from ARP3 - Screen 2



Check for Updates

Use this screen to check if there is a later version of arpReach to the one you are currently running.

Your version	1.1.010
Latest version	1.1.010
You already have the latest version	

Setup / Check for Updates

For best performance, we advise always download and installing the latest version from the hub.

<http://hub.arpreach.net>

where you can sign in with your arpReach license number and license password from your order confirmation email.





DYNAMIC CONTENT TAGS



Dynamic Content Tags

Use these tags in messages and subject lines to include dynamic content - content that changes based on information stored within the arpReach database. Explanations given where the meaning is not obvious.

- Mandatory parameters are inside < ... >
- Optional parameters are inside [...]

Date Tags

Inserts today's date in one of the 8 formats defined in *Setup / System Settings / System / Date Formats*

- {DATE_1}
- {DATE_2}
- {DATE_3}
- {DATE_4}
- {DATE_5}
- {DATE_6}
- {DATE_7}
- {DATE_8}

Variable Tags

Inserts the contents of a variable using the variable's tag. An optional default value will be inserted if the variable does not exist or is blank.

- {VARIABLE_<tag> [default value]}
 - *Example #1*
{VARIABLE_my_price}
 - *Example #2*
{VARIABLE_my_price unlisted}

Ad Tags

Inserts the plain text or HTML version of an ad using the ad's tag. An optional default value will be inserted if the ad does not exist or is blank.

- {AD_<tag> [default value]}



- {AD_TEXT_<tag> [default value]}
- {AD_HTML_<tag> [default value]}
 - *Example #1*
{AD_my_ad}
 - *Example #2*
{AD_my_ad not currently available}

{AD} and {AD_TEXT} are equivalent.

Persona Tags

Inserts information from the persona that has been assigned to the message. An optional default value will be inserted if the information is blank.

- {PERSONA_TITLE [default value]}
- {PERSONA_FIRST_NAME [default value]}
- {PERSONA_LAST_NAME [default value]}
- {PERSONA_FULL_NAME [default value]}
- {PERSONA_POSITION [default value]}
- {PERSONA_DEPARTMENT [default value]}
- {PERSONA_COMPANY [default value]}
- {PERSONA_ADDRESS_1 [default value]}
- {PERSONA_ADDRESS_2 [default value]}
- {PERSONA_ADDRESS_3 [default value]}
- {PERSONA_ADDRESS_4 [default value]}
- {PERSONA_ADDRESS_5 [default value]}
- {PERSONA_PHONE_NUMBER_1 [default value]}
- {PERSONA_PHONE_NUMBER_2 [default value]}
- {PERSONA_FAX_NUMBER_1 [default value]}
- {PERSONA_FAX_NUMBER_2 [default value]}
- {PERSONA_EMAIL_ADDRESS_1 [default value]}
- {PERSONA_EMAIL_ADDRESS_2 [default value]}
- {PERSONA_EMAIL_ADDRESS_3 [default value]}
- {PERSONA_EMAIL_ADDRESS_4 [default value]}
- {PERSONA_EMAIL_ADDRESS_5 [default value]}
- {PERSONA_WEBSITE_1 [default value]}
- {PERSONA_WEBSITE_2 [default value]}
- {PERSONA_WEBSITE_3 [default value]}



- {PERSONA_WEBSITE_4 [default value]}
- {PERSONA_WEBSITE_5 [default value]}
- {PERSONA_SIGNATURE_1 [default value]}
- {PERSONA_SIGNATURE_2 [default value]}
- {PERSONA_SIGNATURE_3 [default value]}
- {PERSONA_SIGNATURE_4 [default value]}
- {PERSONA_SIGNATURE_5 [default value]}
- {PERSONA_RESOURCE_BOX_1 [default value]}
- {PERSONA_RESOURCE_BOX_2 [default value]}
- {PERSONA_RESOURCE_BOX_3 [default value]}
- {PERSONA_RESOURCE_BOX_4 [default value]}
- {PERSONA_RESOURCE_BOX_5 [default value]}
- {PERSONA_OTHER_1 [default value]}
- {PERSONA_OTHER_2 [default value]}
- {PERSONA_OTHER_3 [default value]}
- {PERSONA_OTHER_4 [default value]}
- {PERSONA_OTHER_5 [default value]}

Broadcast Tags

Inserts information from the broadcast being sent. These tags should not be inserted into follow-up messages. An optional default value will be inserted if the information is blank.

- {SENDER_NAME}
- {SENDER_EMAIL_ADDRESS}
- {REPLY_TO_EMAIL_ADDRESS [default value]}

To insert a link to the online version of the broadcast

- {BROADCAST_ONLINE}
- {BROADCAST_ONLINE_TEXT}
- {BROADCAST_ONLINE_HTML}

{BROADCAST_ONLINE} and {BROADCAST_ONLINE_TEXT} are equivalent.

To insert the header or footer at a place other than the top/bottom

- {HEADER_TEXT [default value]}



- {HEADER_HTML [default value]}
- {FOOTER_TEXT [default value]}
- {FOOTER_HTML [default value]}

System settings tags

To insert content from the Setup / System Settings section An optional default value will be inserted if the information is blank.

- {ANTI_SPAM_MESSAGE [default value]}
- {PRIVACY_STATEMENT [default value]}
- {MANAGE_LINK_TEXT [default value]}
- {UNSUBSCRIBE_LINK_TEXT [default value]}
- {EDIT_LINK_TEXT [default value]}
- {EDIT_LINK_TEXT [default value]}
- {AFFILIATE_ID [default value]}
- {AFFILIATE_LINK_TEXT [default value]}
- {AFFILIATE_LINK [default value]}
- {AFFILIATE_AD [default value]}
- {AFFILIATE_AD_TEXT [default value]}
- {AFFILIATE_AD} and {AFFILIATE_AD_TEXT} are equivalent.
- {AFFILIATE_AD_HTML [default value]}
- {NEXT_LINK_TEXT [default value]}
- {RESOURCE_BOX_TEXT [default value]}
- {SUPPORT_EMAIL_ADDRESS [default value]}
- {SUPPORT_WEBSITE [default value]}
- {SYSTEM_CONFIRMATION_SUBJECT [default value]}
- {SYSTEM_CONFIRMATION_TEXT [default value]}
- {SYSTEM_CONFIRMATION_HTML [default value]}

Contact tags

Inserts information for the recipient contact. An optional default value will be inserted if the information is blank.

- {CONTACT_ID}
- {EMAIL_ADDRESS}
- {REFERER_ID [default value]}



- {TITLE [default value]}
- {FIRST_NAME [default value]}
- {MIDDLE_NAME [default value]}
- {LAST_NAME [default value]}
- {FULL_NAME [default value]}
- {COMPANY [default value]}
- {DEPARTMENT [default value]}
- {ADDRESS_1 [default value]}
- {ADDRESS_2 [default value]}
- {ADDRESS_3 [default value]}
- {CITY [default value]}
- {STATE [default value]}
- {POSTAL_CODE [default value]}
- {PHONE_NUMBER_1 [default value]}
- {PHONE_NUMBER_2 [default value]}
- {PHONE_NUMBER_3 [default value]}
- {MOBILE_PHONE_NUMBER_1 [default value]}
- {MOBILE_PHONE_NUMBER_2 [default value]}
- {MOBILE_PHONE_NUMBER_3 [default value]}
- {FAX_NUMBER_1 [default value]}
- {FAX_NUMBER_2 [default value]}
- {FAX_NUMBER_3 [default value]}
- {ALTERNATIVE_EMAIL_ADDRESS_1 [default value]}
- {ALTERNATIVE_EMAIL_ADDRESS_2 [default value]}
- {ALTERNATIVE_EMAIL_ADDRESS_3 [default value]}

To insert links specific to the recipient contact

- {MANAGE_LINK}
- {EDIT_LINK}

To insert custom field information for the recipient contact

- {CUSTOM_<tag> [default value]}
 - *Example #1*
{CUSTOM_hat_size}
 - *Example #2*
{CUSTOM_hat_size not stored for you}



Subscription tags

Tags that can be used in follow-up messages. These tags should not be inserted into broadcast messages.

- {MESSAGE_COUNT} - the number of messages in the autoresponder
- {MESSAGE_NUMBER} - this message number in the autoresponder
- {SUBSCRIPTION_LENGTH} - the number of days since subscription
- {CONTACT_COUNT} - the number of unique subscribers
- {SENDER_NAME}
- {SENDER_EMAIL_ADDRESS}
- {REPLY_TO_EMAIL_ADDRESS [default value]}
- {SUBSCRIBE_IP_ADDRESS [default value]}
- {SUBSCRIBE_USER_AGENT [default value]}
- {CONFIRM_IP_ADDRESS [default value]}
- {CONFIRM_USER_AGENT [default value]}
- {UNSUBSCRIBE_IP_ADDRESS [default value]}
- {UNSUBSCRIBE_USER_AGENT [default value]}
- {SUBSCRIBE_DATE_1} - using date format #1 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_2} - using date format #2 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_3} - using date format #3 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_4} - using date format #4 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_5} - using date format #5 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_6} - using date format #6 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_7} - using date format #7 as defined in Setup / System Settings
- {SUBSCRIBE_DATE_8} - using date format #8 as defined in Setup / System Settings
- {TRACKING_TAG_NAME [default value]}
- {AUTORESPONDER_CONFIRMATION_SUBJECT [default value]}
- {AUTORESPONDER_CONFIRMATION_TEXT [default value]}
- {AUTORESPONDER_CONFIRMATION_HTML [default value]}
- {NEXT_LINK} - link to send the next message immediately
- {CONFIRM_LINK} - link to confirm subscription
- {UNSUBSCRIBE_LINK} - link to unsubscribe from this autoresponder only
- {RSS_FEED_LINK} - link to the RSS feed of the sequence

Link tags

Inserts the URL of a trackable link using the trackable link's tag.



- {LINK_<tag>}
 - *Example #1*
{LINK_link_to_product_1}
 - *Example #2*
{LINK_link_to_product_2}





SUBSCRIPTION FORM CODES



Subscription Form Codes

When a subscription form is processed, the success or failure of the form's submission is posted as a code and a message in the URL of the success/failure page.

- *Example*
`http://www.yourpage.com?code=04&message=The%20list%20no%20longer%20exists`

If you are using your own custom success/failure pages and you do not want the code or message to be appended to its URL, you can disable this functionality in *Setup / System Settings / Custom Pages* and checking the *Disable error code and message* box.

The code is supplied in the “code” parameter of the custom page URL and can be read by your script. For example, in PHP, use `$_GET['code']` to read the code value. These codes apply only to submissions of subscribe/unsubscribe forms, not other means of subscribing.

Success Codes

- 01 = Successful subscription.
- 02 = Successful subscription - confirmation email sent.
- 03 = Successful subscription - first email sent.
- 04 = Successful unsubscription.

Error Codes

- 00 = There was an unknown error.
- 01 = Your browser has not sent its user agent type.
- 02 = The form parameters are not correct.
- 03 = The form parameters are not correct.
- 04 = This list no longer exists.
- 05 = This list does not allow subscriptions by form.
- 06 = This list is currently disabled.
- 07 = This list is not currently accepting new subscriptions.
- 08 = There was a form validation error.
- 09 = The security code cannot be blank.
- 10 = The security code is not correct.
- 11 = The email address cannot be blank.
- 12 = The email address is not valid.
- 13 = The email address is not permitted to subscribe.



- 14 = The email address is not permitted to subscribe.
- 15 = The title cannot be blank.
- 16 = The first name cannot be blank.
- 17 = The middle name cannot be blank.
- 18 = The last name cannot be blank.
- 19 = The full name cannot be blank.
- 20 = The company cannot be blank.
- 21 = The department cannot be blank.
- 22 = Address #1 cannot be blank.
- 23 = Address #2 cannot be blank.
- 24 = Address #3 cannot be blank.
- 25 = The town or city cannot be blank.
- 26 = The state or province cannot be blank.
- 27 = The postal or ZIP code cannot be blank.
- 28 = The country cannot be blank.
- 29 = The alternative email address #1 cannot be blank.
- 30 = The alternative email address #2 cannot be blank.
- 31 = The alternative email address #3 cannot be blank.
- 32 = The phone number #1 cannot be blank.
- 33 = The phone number #2 cannot be blank.
- 34 = The phone number #3 cannot be blank.
- 35 = The mobile phone number #1 cannot be blank.
- 36 = The mobile phone number #2 cannot be blank.
- 37 = The mobile phone number #3 cannot be blank.
- 38 = The fax number #1 cannot be blank.
- 39 = The fax number #2 cannot be blank.
- 40 = The fax number #3 cannot be blank.
- 41 = The referer id cannot be blank.
- 42 = Your subscription request could not be completed.
- 43 = Duplicate subscriptions are not allowed.
- 44 = Your subscription request could not be completed.





POSTING HTTP DATA



Posting HTTP Data

If you are a software developer and you wish your software to post subscriptions and unsubscriptions to arpReach, this section explains how to do it.

- Create a subscription form in arpReach
- Post data to it using an HTTP request from your software

Create and save a form in the “subscription forms” section of the autoresponder. Then generate the form html code there too. From this you can see the fields you need to map to. It is very similar to ARP3 but note the “POST” url is different for every form because most of the form’s parameters are held in the database instead of “hidden” form fields.

Here’s an example with the form code and associated PHP code. Note the “action” field of the form tag, which is unique for every form stored in arpReach. Also, note that the USER_AGENT is mandatory in the curl post or it will be ignored. It doesn’t matter what you set it to This is really just a defence against spambots that often don’t bother to have a user agent. ARP3 was the same in this respect.

Example Form Code

```
<!-- subscription_form_lwzysh -->
<div id='subscription_form_lwzysh'>
<form method='post' action='http://yourdomain.com/arpreach/a.php/sub/1/lwzysh'>
<div>
<label>Email address</label>
<input type='text' id='email_address' name='email_address' value=''>
</div>
<div>
<label>First name</label>
<input type='text' id='first_name' name='first_name' value=''>
</div>
<div><input type='submit' value='Submit'></div>
</form>
</div>
<!-- subscription_form_lwzysh -->
```



Example PHP Code - Subscribe

```
define(URL, 'http://yourdomain.com/arpreach/a.php/sub/1/lwzysh');

if (! empty($_POST) && count($_POST) > 0) {
    $post_fields = array(
        'email_address' => 'whatever@whatever.com',
        'first_name' => 'first_name_here',
        'last_name' => 'last_name_here');

    $ch = curl_init();

    curl_setopt($ch, CURLOPT_USERAGENT, 'ARPR');
    curl_setopt($ch, CURLOPT_URL, URL);
    curl_setopt($ch, CURLOPT_POST, TRUE);
    curl_setopt($ch, CURLOPT_RETURNTRANSFER, TRUE);
    curl_setopt($ch, CURLOPT_POSTFIELDS, $post_fields);
    curl_exec($ch);

    curl_close($ch);
} // if
```

Example PHP Code - Unsubscribe

You can add another \$post_field entry for unsubscribing:

```
$post_fields['unsubscribe'] = 1;
```





BOUNCE CODES



Bounce Codes

When arpReach sends an email and that email bounces, a bounce code is generated. There are two types of bounces:

- hard bounces
- soft bounces

A hard bounce generally means that there is no point in trying to send email to that address because the reason for the bounce is unlikely to be resolved. Examples include non-existent mailboxes or domains. When arpReach receives a hard bounce, that contact's subscriptions are immediately flagged as "failed".

A soft bounce generally means that the issue could be resolved in future so follow-up messages will be retried several times. Multiple soft bounces will eventually result in a contact's subscription being flagged as "failed" and no more follow-up messages will be sent for that subscription.

The analysis of bounced emails is a very technical subject and beyond the scope of this guide. The following represents a technical explanation of the codes that arpReach generates for trigger strings in bounced emails and these can be used as a lookup for bounce codes shown in contact records in arpReach.

```
`trigger'  => "/no such address here/i"  
'code'    => '0001'  
'is_hard' => 1
```

```
`trigger'  => "/user doesn't have.*account/is"  
'code'    => '0002'  
'is_hard' => 1
```

```
`trigger'  => "/user unknown/i"  
'code'    => '0003'  
'is_hard' => 1
```

```
`trigger'  => "/no mailbox/i"  
'code'    => '0004'  
'is_hard' => 1
```

```
`trigger'  => "/can't find.*mailbox/is"  
'code'    => '0005'  
'is_hard' => 1
```



```

`trigger'  => "/=D5=CA=BA=C5=B2=BB=B4=E6=D4=DA/i"
`code'     => `0006'
`is_hard'  => 1

`trigger'  => "/Unrouteable address/i",
`code'     => `0007',
`is_hard'  => 1),

`trigger'  => "/delivery[^\n\r]+failed/i"
`code'     => `0008'
`is_hard'  => 1

`trigger'  => "/unknown local-part/i"
`code'     => `0009'
`is_hard'  => 1

`trigger'  => "/Invalid.*(?:alias|account|recipient|address|email|mailbox|user)/
is"
`code'     => `0010'
`is_hard'  => 1

`trigger'  => "/No such.*(?:alias|account|recipient|address|email|mailbox|user)/
is"
`code'     => `0011'
`is_hard'  => 1

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*no.*accep
t.*mail>/is"
`code'     => `0012'
`is_hard'  => 1

`trigger'  => "/over.*quota/is"
`code'     => `0013'
`is_hard'  => 0

`trigger'  => "/quota exceeded/i"
`code'     => `0014'
`is_hard'  => 0

`trigger'  => "/mailbox.*full/is"
`code'     => `0015'
`is_hard'  => 0

```



```
`trigger'  => "/The message to.*bounce.*Quota exceed/is"  
'code'    => '0016'  
'is_hard' => 0
```

```
`trigger'  => "/user is inactive/i"  
'code'    => '0017'  
'is_hard' => 1
```

```
`trigger'  => "/inactive account/i"  
'code'    => '0018'  
'is_hard' => 1
```

```
`trigger'  => "/input\output error/i"  
'code'    => '0019'  
'is_hard' => 1
```

```
`trigger'  => "/not open new email file/i"  
'code'    => '0020'  
'is_hard' => 1
```

```
`trigger'  => "/Resources temporarily unavailable/i"  
'code'    => '0021'  
'is_hard' => 0
```

```
`trigger'  => "/does not accept.*non-Western/is"  
'code'    => '0022'  
'is_hard' => 0
```

```
`trigger'  => "/quota exceed/i"  
'code'    => '0023'  
'is_hard' => 0
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*full/is"  
'code'    => '0024'  
'is_hard' => 0
```

```
`trigger'  => "/Insufficient system storage/i"  
'code'    => '0025'  
'is_hard' => 0
```

```
`trigger'  => "/File.*too large/is"  
'code'    => '0026'  
'is_hard' => 0
```



```
`trigger'  => "/larger than.*limit/is"
`code'     => '0027'
`is_hard'  => 0
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*not.*list/is"
`code'     => '0028'
`is_hard'  => 1
```

```
`trigger'  => "/user path no exist/i"
`code'     => '0029'
`is_hard'  => 1
```

```
`trigger'  => "/Relay.*(?:denied|prohibited)/is"
`code'     => '0030'
`is_hard'  => 1
```

```
`trigger'  => "/no.*valid.*(?:alias|account|recipient|address|email|mailbox|user)/is"
`code'     => '0031'
`is_hard'  => 1
```

```
`trigger'  => "/Invalid.*(?:alias|account|recipient|address|email|mailbox|user)/is"
`code'     => '0032'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*(?:disabled|discontinued)/is"
`code'     => '0033'
`is_hard'  => 1
```

```
`trigger'  => "/user doesn't have.*account/is"
`code'     => '0034'
`is_hard'  => 1
```

```
`trigger'  => "/(?:unknown|illegal).*(?:alias|account|recipient|address|email|mailbox|user)/is"
`code'     => '0035'
`is_hard'  => 1
```



```

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*(:un|not\s+)available/is"
`code'     => '0036'
`is_hard'  => 1

`trigger'  => "/no (?:alias|account|recipient|address|email|mailbox|user)/i"
`code'     => '0037'
`is_hard'  => 1

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*unknown/is"
`code'     => '0038'
`is_hard'  => 1

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*disabled/is"
`code'     => '0039'
`is_hard'  => 1

`trigger'  => "/No such (?:alias|account|recipient|address|email|mailbox|user)/i"
`code'     => '0040'
`is_hard'  => 1

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*not found/is"
`code'     => '0041'
`is_hard'  => 1

`trigger'  => "/deactivated (?:alias|account|recipient|address|email|mailbox|user)/i"
`code'     => '0042'
`is_hard'  => 1

`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*reject/is"
`code'     => '0043'
`is_hard'  => 1

`trigger'  => "/bounce.*administrator/is"
`code'     => '0044'
`is_hard'  => 1

```



```
'trigger'  => "/<.*>.*disabled/is"
'code'     => '0045'
'is_hard'  => 1

'trigger'  => "/not our customer/i"
'code'     => '0046'
'is_hard'  => 1

'trigger'  => "/Wrong (?:alias|account|recipient|address|email|mailbox|user)/i"
'code'     => '0047'
'is_hard'  => 1

'trigger'  => "/(?:unknown|bad).*(?:alias|account|recipient|address|email|mailbox|user)/is"
'code'     => '0048'
'is_hard'  => 1

'trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*not OK/is"
'code'     => '0049'
'is_hard'  => 1

'trigger'  => "/Access.*Denied/is"
'code'     => '0050'
'is_hard'  => 1

'trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*lookup.*fail/is"
'code'     => '0051'
'is_hard'  => 1

'trigger'  => "/(?:recipient|address|email|mailbox|user).*not.*member of domain/is"
'code'     => '0052'
'is_hard'  => 1

'trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*cannot be verified/is"
'code'     => '0053'
'is_hard'  => 1
```



```
`trigger'  => "/Unable to relay/i"
`code'     => '0054'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*?(?:n't|not) exist/is"
`code'     => '0055'
`is_hard'  => 1
```

```
`trigger'  => "/not have an account/i"
`code'     => '0056'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*is not allowed/is"
`code'     => '0057'
`is_hard'  => 1
```

```
`trigger'  => "/inactive.*(?:alias|account|recipient|address|email|mailbox|user)/is"
`code'     => '0058'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*Inactive/is"
`code'     => '0059'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user) closed due to inactivity/i"
`code'     => '0060'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user) not activated/i"
`code'     => '0061'
`is_hard'  => 1
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*?(?:suspend|expire)/is"
`code'     => '0062'
`is_hard'  => 1
```



```
`trigger' => "/(?:alias|account|recipient|address|email|mailbox|user).*no longer  
exist/is"  
'code' => '0063'  
'is_hard' => 1  
  
'trigger' => "/(?:forgery|abuse)/i"  
'code' => '0064'  
'is_hard' => 1  
  
'trigger' => "/(?:alias|account|recipient|address|email|mailbox|user).*restrict/  
is"  
'code' => '0065'  
'is_hard' => 1  
  
'trigger' => "/(?:alias|account|recipient|address|email|mailbox|user).*locked/  
is"  
'code' => '0066'  
'is_hard' => 1  
  
'trigger' => "/(?:alias|account|recipient|address|email|mailbox|user) refused/i"  
'code' => '0067'  
'is_hard' => 1  
  
'trigger' => "/sender.*not.*domain/is"  
'code' => '0068'  
'is_hard' => 1  
  
'trigger' => "/Message refused/i"  
'code' => '0069'  
'is_hard' => 1  
  
'trigger' => "/No permit/i"  
'code' => '0070'  
'is_hard' => 1  
  
'trigger' => "/domain isn't in.*allowed rcpthost/is"  
'code' => '0071'  
'is_hard' => 1  
  
'trigger' => "/AUTH FAILED/i"  
'code' => '0072'  
'is_hard' => 1
```



```
`trigger'    => "/relay.*not.*(?:permit|allow)/is"
`code'       => '0073'
`is_hard'    => 1

`trigger'    => "/not local host/i"
`code'       => '0074'
`is_hard'    => 1

`trigger'    => "/Unauthorized relay/i"
`code'       => '0075'
`is_hard'    => 1

`trigger'    => "/Transaction.*fail/is"
`code'       => '0076'
`is_hard'    => 1

`trigger'    => "/Invalid data/i"
`code'       => '0077'
`is_hard'    => 1

`trigger'    => "/Local user only/i"
`code'       => '0078'
`is_hard'    => 1

`trigger'    => "/not.*permit.*to/is"
`code'       => '0079'
`is_hard'    => 1

`trigger'    => "/Content reject/i"
`code'       => '0080'
`is_hard'    => 0

`trigger'    => "/MIME\//REJECT/i"
`code'       => '0081'
`is_hard'    => 0

`trigger'    => "/MIME error/i"
`code'       => '0082'
`is_hard'    => 0

`trigger'    => "/Mail data refused.*AISP/is"
`code'       => '0083'
`is_hard'    => 0
```



```
`trigger'    => "/Host unknown/i"
`code'       => '0084'
`is_hard'    => 1

`trigger'    => "/Specified domain.*not.*allow/is"
`code'       => '0085'
`is_hard'    => 1

`trigger'    => "/No route to host/i"
`code'       => '0086'
`is_hard'    => 1

`trigger'    => "/unrouteable address/i"
`code'       => '0087'
`is_hard'    => 1

`trigger'    => "/System.*busy/is"
`code'       => '0088'
`is_hard'    => 0

`trigger'    => "/Resources temporarily unavailable/i"
`code'       => '0089'
`is_hard'    => 0

`trigger'    => "/sender is rejected/i"
`code'       => '0090'
`is_hard'    => 0

`trigger'    => "/Client host rejected/i"
`code'       => '0091'
`is_hard'    => 0

`trigger'    => "/MAIL FROM.*mismatches client IP/is"
`code'       => '0092'
`is_hard'    => 0

`trigger'    => "/denyip/i"
`code'       => '0093'
`is_hard'    => 0
```



```
`trigger'  => "/client host.*blocked/is"
`code'     => '0094'
`is_hard'  => 0

`trigger'  => "/mail.*reject/is"
`code'     => '0095'
`is_hard'  => 0

`trigger'  => "/spam.*detect/is"
`code'     => '0096'
`is_hard'  => 0

`trigger'  => "/reject.*spam/is"
`code'     => '0097'
`is_hard'  => 0

`trigger'  => "/SpamTrap/i"
`code'     => '0098'
`is_hard'  =>

`trigger'  => "/Verify mailfrom failed/i"
`code'     => '0099'
`is_hard'  => 0

`trigger'  => "/MAIL.*FROM.*mismatch/is"
`code'     => '0100'
`is_hard'  => 0

`trigger'  => "/spam scale/i"
`code'     => '0101'
`is_hard'  => 0

`trigger'  => "/junk mail/i"
`code'     => '0102'
`is_hard'  => 0

`trigger'  => "/message filtered/i"
`code'     => '0103'
`is_hard'  => 0

`trigger'  => "/subject.*consider.*spam/is"
`code'     => '0104'
`is_hard'  => 0
```



```
`trigger'  => "/Temporary local problem/i"  
'code'    => '0105'  
'is_hard' => 0
```

```
`trigger'  => "/system config error/i"  
'code'    => '0106'  
'is_hard' => 0
```

```
`trigger'  => "/delivery.*suspend/is"  
'code'    => '0107'  
'is_hard' => 0
```

```
`trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*invalid/  
is"  
'code'    => '0108'  
'is_hard' => 1
```

```
`trigger'  => "/Deferred.*No such.*(?:file|directory)/is"  
'code'    => '0109'  
'is_hard' => 1
```

```
`trigger'  => "/mail receiving disabled/i"  
'code'    => '0110'  
'is_hard' => 1
```

```
`trigger'  => "/bad.*(?:alias|account|recipient|address|email|mailbox|user)/is"  
'code'    => '0111'  
'is_hard' => 1
```

```
`trigger'  => "/over.*quota/is"  
'code'    => '0112'  
'is_hard' => 0
```

```
`trigger'  => "/quota.*exceeded/is"  
'code'    => '0113'  
'is_hard' => 0
```

```
`trigger'  => "/exceed.*\n?.*quota/is"  
'code'    => '0114'  
'is_hard' => 0
```



```
'trigger'  => "/(?:alias|account|recipient|address|email|mailbox|user).*full/is"
'code'     => '0115'
'is_hard'  => 0

'trigger'  => "/space.*not.*enough/is"
'code'     => '0116'
'is_hard'  => 0

'trigger'  => "/Deferred.*Connection(?:refused|reset)/is"
'code'     => '0117'
'is_hard'  => 0

'trigger'  => "/Invalid host name/i"
'code'     => '0118'
'is_hard'  => 1

'trigger'  => "/Deferred.*No route to host/is"
'code'     => '0119'
'is_hard'  => 1

'trigger'  => "/Host unknown/i"
'code'     => '0120'
'is_hard'  => 1

'trigger'  => "/Name server timeout/i"
'code'     => '0121'
'is_hard'  => 1

'trigger'  => "/Deferred.*Connection.*tim(?:e|ed).*out/is"
'code'     => '0122'
'is_hard'  => 1

'trigger'  => "/Deferred.*host name lookup failure/is"
'code'     => '0123'
'is_hard'  => 1

'trigger'  => "/MX list.*point.*back/is"
'code'     => '0124'
'is_hard'  => 1

'trigger'  => "/I\\O error/i"
'code'     => '0125'
'is_hard'  => 0
```



```
`trigger' => "/connection.*broken/is"  
`code'    => '0126'  
`is_hard' => 0
```

```
`trigger' => "/Delivery to the following recipients failed/i"  
`code'    => '0127'  
`is_hard' => 0
```

```
`trigger' => "/User unknown/i"  
`code'    => '0128'  
`is_hard' => 1
```

```
`trigger' => "/Service unavailable/i"  
`code'    => '0129'  
`is_hard' => 1
```





USEFUL LINKS



Main web site

- **arpReach web site**

<http://www.arpreach.com>

Installation and upgrade

- **Professional installation services**

<http://www.arpreach.com/install>

- **Professional ARP3 upgrade services**

<http://www.arpreach.com/upgrade>

Downloads and resources

- **arpReach Hub for downloads and resources**

<http://hub.arpreach.net>

Support

- **arpReach support**

<http://support.arpreach.com>





arpReach.com